



Together we can
change lives

Serving Tyne & Wear and Northumberland
communityfoundation.org.uk

Powering philanthropy in North East England

Our mission

We grow giving and philanthropy, matching generous people with our region’s important community causes. We do this by:

- enabling people from all walks of life to set up charitable funds, give collectively or share expertise;
- supporting small, local charities and community organisations through grants from our funds and help from our networks;
- shining a light on vital issues affecting our area and working with others to tackle them; and
- building our endowment as an asset for our communities now, and for generations to come.

Our values

We seek to **make a difference** at the Foundation by:



Sharing our love for North East England and wanting it to thrive



Believing in the importance of giving and philanthropy



Backing the brilliant work of local charities



Championing disadvantaged people and less well supported causes



Starting where they are and encouraging their ambitions



Being respectful, reliable and responsive



Building lifelong relationships



Applying sound judgement and knowing our stuff



Staying independent and accountable



Sparking off and challenging each other across our organisation



Taking personal and collective responsibility



Learning from our successes and mistakes



Embracing diversity and treating people fairly



Having a healthy workplace and positive balance in our lives



Taking our work seriously but not ourselves



Welcome from the Chair & CEO

This Yearbook comes out at an extraordinary time as the world faces the long-term impacts of the Coronavirus pandemic. We, along with our fellow community foundations, have had to rise to the challenge of ensuring philanthropy responds effectively to the unprecedented social and economic needs that have arisen.

Our response to the pandemic, and support for the amazing local charities and community groups who’ve been at the frontline, is covered on pages 6-7. But, while much of our focus has been on helping communities through the pandemic, we have still been able to make progress in other areas. We awarded over £6.6 million in 1,256 grants to organisations and individuals. We saw the exceptional sum of £4.9 million added to our endowment through private and business donors, and through the transfer of dormant funds and trusts. We began a critical conversation about diversity in philanthropy, and we published comprehensive research on the state of the sector in our area. You can find out about all these aspects of our work in the following pages.

More than ever, thanks go to our brilliant staff team and trustees who have kept our work going throughout the crisis despite our own reduced income, capacity and adjustment to remote working. The Board has been further strengthened by the addition of Michael Brodie, Chief Executive of NHS Business Services Authority. Since stability is key right now, the Board took the decision to postpone its recruitment of a new chair, so Fiona will be remaining in post until late 2021.

Although, like many organisations, we have had to put some things on hold, we have not lost sight of our long-term goals. The strategy we shaped in early 2020 is more relevant than ever, with its focus on fairness, generosity and the need for a strong and vibrant civil society that’s able to meet change.

As ever, our deep gratitude goes to our donors, grantees, partners and members who are with us on our journey.

Fiona Cruickshank OBE, Chair
Rob Williamson, CEO

Our Area...

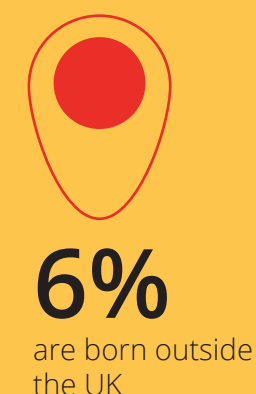
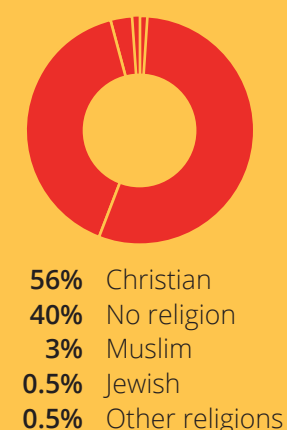
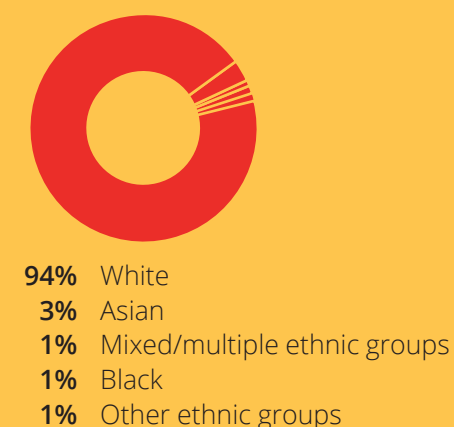
...covers **2,089 square miles** with **32 English Heritage** and **17 National Trust sites**, a **UNESCO World Heritage site**, is home to **7,200 charities and community organisations** and hosts the **world's largest half marathon** and...



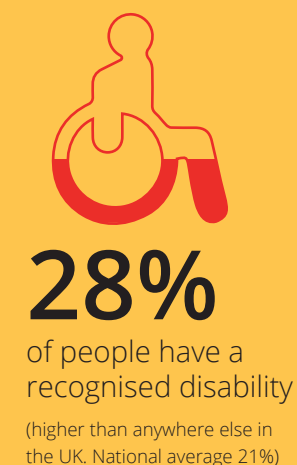
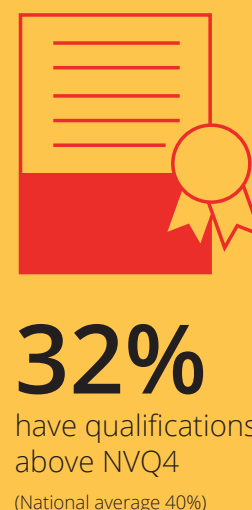
Clockwise from Top:
Harvey Coxon who received a grant from the Innogy Renewables UK Middlemoor Wind Farm Community Benefit Fund to start in his career as a mechanic.

Curious Arts, Young Asian Voices and LD North East at the #PoweredByPhilanthropy2019 launch

Statistics on this page relate to our principal area of benefit, Tyne & Wear and Northumberland, where applicable and otherwise to North East England as a whole.



(National Average £43,000)



Responding to the pandemic

The Community Foundation has been at the forefront of the philanthropic response to the Covid-19 pandemic in North East England, bringing in over £2 million in funds for Coronavirus response and recovery work.

'We knew early on that we had to step up, and that specialist funds and rapid grant-making were essential,' says Rob Williamson, the Foundation's CEO. 'We launched our own Coronavirus fund in March 2020, putting in £200,000 from our unrestricted pot, with a call for new and existing donors and partners to join us.' Major contributions came from Newcastle Building Society, Sir James Knott Trust and Virgin Money Foundation. Meanwhile, public donations rolled in via the fund's online giving page. At the same time, plans were being put in place for a UK-wide appeal headed by the new National Emergencies Trust (NET). From April, the Community Foundation began receiving funds from NET's appeal to distribute in its area.

Left to right:
Community Help and Neighbourly Care for Everyone Sunderland (CHANCE) received a £6,500 grant to support their coronavirus work
CHANCE staff delivering an Easter Egg to a local resident

By September 2020, the Community Foundation had awarded over £1.2 million in grants to 154 organisations.



Churches Together South Tyneside received one of the first grants, for its Happy at Home project. Margaret Stephenson-Gray, the project co-ordinator says: 'When we saw that lockdown was coming, we knew we needed to adapt our support for older people. We quickly pulled staff from other projects and had them contact all our volunteer befrienders to ask them to continue the befriending service but over the phone instead of in person. We've been able to support over 300 people daily as a result. We distributed food parcels, Easter eggs and even flowers. When we heard our users were getting bored, we collected all the games, jigsaws and other activities we use at our weekly community hubs and added them to the food parcels we sent out.'

By September 2020, the Community Foundation had awarded over £1.2 million in grants to 154 organisations. Community Help and Neighbourly Care for Everyone Sunderland (CHANCE) received £6,500 to support its coronavirus work. Set up in 1993 by a group of volunteers to provide training and education to women across the city's Hendon Ward, CHANCE has since developed to serve the whole community and taken on its own building. Julie Maven, Centre Manager and one of the founding volunteers explains: 'We're not just a centre for people in need. Often, we're the only contact our elderly residents have. When lockdown started and the elderly were advised to shield, it meant that many of them were unable to provide for themselves – they

were just stuck indoors.' So, CHANCE sprang into action, cooking and delivering healthy and nutritious meals for elderly and vulnerable people five days a week, free of charge, and supporting families who were impacted financially as a result of Coronavirus.

As the Government began easing lockdown, the Community Foundation's focus turned to how it could best help charities and community groups recover from the impact on their finances and renew their work. 'From the beginning, we saw our job as funding the immediate response to the pandemic, and longer-term recovery for organisations whose work would be affected,' Rob Williamson says. 'As NET monies came in to provide relief for the most vulnerable during lockdown, we saw that our funds raised locally could be the backbone of our recovery and renewal work.'

Determining how best to deploy these and other funds in a rapidly changing context has been a challenge. The Foundation's team is working with local authorities, sector support bodies and other funders to identify priority places and people to target. 'It's vital with limited funds that we use them to make the most difference,' Williamson explains. 'We need also to ensure we complement what other organisations regionally and nationally are doing.' With the pandemic's impact likely to affect the region's most disadvantaged communities hardest, the Foundation's philanthropic response will continue for some time to come.



The Community Foundation is distributing money raised through the National Emergencies Trust's Coronavirus appeal in Tyne & Wear and Northumberland.

Coronavirus funding has been made possible through the generous support of many donors, including:



Providing solutions that make a difference

It's not often that new donors to the Community Foundation make headline news around the UK and further afield. But that's exactly what happened when Nicola Curtin, Professor of Experimental Cancer Therapeutics at Newcastle University, set up her fund.

Nicola was part of the team involved in the creation of Rubraca®, a new cancer drug that has been approved for use on the NHS to treat Ovarian cancer. As part of the team, Professor Curtin received a percentage of the profits when the research was sold. This sudden influx of funds gave Nicola pause for reflection.

'I feel very privileged to have such a fulfilling career,' Nicola says. 'By working with a team of scientists at Newcastle University to bring Rubraca® to market, we've created a cancer treatment that has the potential to change thousands of women's lives. This journey made me reflect on my own life, and it seemed wrong for me to benefit financially. I'm proud that this research will change lives, but I recognise that luck played a significant part in our success. I am also lucky to have everything that I need in life – a good job, a loving family, a nice house – but, in society there are many who are not so lucky to have this. I know first-hand that people are capable of amazing things, but society sometimes doesn't always allow people to reach their full potential. So, I decided I wanted to leave a lasting legacy that will change lives for the better.'

The Community Foundation's discussions with Nicola highlighted her passion to support individuals to develop their skills, talents and confidence in order to overcome barriers to employment or education. Nicola established the Curtin PARP (Passionate About Realising your Potential) Fund, naming it after herself and her groundbreaking research into PARP inhibitors which led to the creation of the drug and her financial windfall. When the

fund was set up, her selfless act of giving struck a chord with many and became a story in national newspapers including The Times, The Sun, The Independent, Metro and saw Nicola interviewed on BBC Radio. Comment sections on these sites, sometimes known for their negativity, were universally supportive of Nicola with calls for formal recognition for her generosity.



Above:
Nicola Curtin and her daughter Helen Goddard with Sandra King, Chief Philanthropy Officer, Community Foundation

Nicola is particularly keen to see the fund support carers, black and minority ethnic people, disabled people, homeless people and people who are experiencing disadvantage that prevents them from realising their potential. While the fund is still in its early days a number of grants have already been made including to the Carers Trust Tyne & Wear to support 40 young carers attend a first aid course and to support Sonya, a 17-year-old who looks after both her parents with help from her siblings. She needed support to buy a laptop to help with her college and apprenticeship work from home. Sonya says 'Having this laptop has allowed me to work from home. If I hadn't had it, I would have been furloughed until we would be clear to go back to work. Using this laptop has allowed me to keep to GDPR standards as I use my work email and programmes on a daily basis and need to keep it confidential and having my own laptop allows me to do so.' It's not all about work though as Sonya continues. 'Having this device also allows me to keep myself entertained and take a break from work which has also improved my overall mental health.'

I decided I wanted to leave a lasting legacy that will change lives for the better.

Revitalising funds for generations to come

The Community Foundation may be best known for enabling new philanthropy. But its role unlocking and maintaining assets held in dormant charities and accounts, and in continuing the work of grant-making bodies whose trustees wish to retire, is just as important. This year the Foundation has added over £3 million to its endowment through such transfers, meaning in some cases grant-making is re-starting for the first time in many years.



It is hugely rewarding to see valuable assets back into circulation and supporting vital causes across our communities.

The most ground-breaking transfer builds on a long-term relationship between the Community Foundation and Newcastle Building Society, with the first ever release of dormant account money from a building society to a UK charity. Newcastle Building Society has transferred £1 million to its fund at the Community Foundation – bringing its total value to over £2 million.

Andrew Haigh, CEO of Newcastle Building Society explains: 'We have a strong relationship with the Community Foundation, and with whom we have a built a significant community fund through Society donations and colleague fundraising. The arrangements for managing dormant assets through the Reclaim Fund have enabled us to make a substantial addition to the Fund, which will further strengthen our ability to make a positive difference for the communities we serve.'

One of the first groups to receive a grant from the fund since the transfer was Silverline Memories which provides 'places to go and things to do' for people living with Dementia in Newcastle and Gateshead. 'The support we have enjoyed has been second to none,' says Chief Executive Sandra Hastings. 'But the flexibility during Covid-19 has been transformational. Instead of our usual day trips, the fund supported our Digital Inclusion project during lockdown which has been essential to ensure people with dementia and their carers continue to feel supported, encouraged and engaged.'

'Revitalising Trusts' is a partnership between the Charity Commission and the Community Foundation's national membership body, UKCF. It has seen several existing, but dormant, charitable funds transferring to the Community Foundation and once again making grants. The Community Foundation's Women's Fund was an exact fit to receive the assets of the Royal Jubilee Education Charity for Girls. With the revitalised monies, the Foundation has supported West End Women and Girls in Newcastle and Women's Health in South Tyneside. To accommodate the transfer of the Berwick-upon-Tweed Nursing Amenities Trust, the

Community Foundation extended the purposes of its Northern Angel Fund. Soon afterwards, Tyneside and Northumberland Mind received a grant to employ a wellbeing coach to support people living with poor mental health in the town.

While these national schemes are helping the Community Foundation unlock dormant assets, it was existing, local relationships that led to the biggest asset transfer of the year. Knowing they wanted to stand back from their duties, the trustees of the Northumberland Village Homes Trust chose to transfer their charity's assets, totalling over £2 million, to establish a fund at the Community Foundation. As part of the wider Foundation, the new fund will increase support for charities and community groups making a difference to the lives of young people in the North East, while building on the Trust's legacy of impactful grant-making.

'It is hugely rewarding to see valuable assets back into circulation and supporting vital causes across our communities,' says Lisa Cappleman, the Community Foundation's Head of Giving and Philanthropy. 'We also find it releases those overseeing dormant assets and older charitable trusts of the burden of trying to make them work. It's a win-win situation for the outgoing trustees, us and our communities.'

Left
Silverline Memories Easter Tea Dance

Below:
Su Legg, Senior Philanthropy Advisor, Community Foundation; Andrew Haigh CEO of Newcastle Building Society; and Rob Williamson, CEO of Community Foundation, celebrate the fund reaching £2 million.



'Time' to make a difference

Giving to make a difference isn't always about money. Giving time and skills can be just as valuable to voluntary organisations. From promoting skills sharing to the importance of trusteeship, the Community Foundation is committed to supporting the sector to thrive but also increase diversity in the boardroom.

'The Community Foundation has always run programmes to bring together those who have time, expertise and skills to offer and groups on the ground who can benefit,' explains Adam Lopardo, the Foundation's Director of External Relations. 'But we wanted to do more, so we recruited a new member of the team, Colette Harrison, to specialise in and develop our sector support work.'

At the heart of the Foundation's offer are its Trustee and Skills Match schemes. Groups seeking to strengthen their boards or improve their skills are matched with the expertise of generous individuals and businesses to enable them to develop their services, be more inclusive and evolve strategies for the future. Colette identifies individuals with appropriate skills and experience, makes introductions and provides advice and guidance to both sides throughout the process.

Trustee Match's focus is on supporting first-time board members on the path to trusteeship. The Foundation works with organisations like the Young Professionals Forum to promote the value of trusteeship at an early career stage and with Yes We Can to provide training. This has benefited organisations seeking to diversify their boardroom and provided valuable professional development opportunities for younger people. Radha Sharma attended a Young Professional Forum event where Colette spoke. She signed up for Trustee Match and is already set to join the board of NIWE. 'The Trustee Match Scheme is a wonderful opportunity for anyone who wishes to join a Board, and support organisations across the North East' says Radha. 'It can be difficult finding the right organisation, and fully understanding your responsibilities, but the Community Foundation has great resources to help everyone'.

'We are thrilled to be working alongside The Community Foundation. So far this relationship has helped us widen our charity network massively, we are incredibly grateful for all of the new connections provided by Colette.'

Accenture Newcastle Charity Team



Skills Match provides a great way for companies to offer services to the charitable sector and empower their employees. One business that has done just this is Accenture which has been working with the Foundation to place apprentices with groups needing support. At the start of Covid-19, Accenture offered a range of support on remote working and video conference to groups.

As well as the matching services, the sector support programme offers a range of workshops and sessions delivered in partnership with others like the Institute of Fundraising, Ethical Property Foundation and Sail Creative, or 'in-house' by Colette and other members of the Foundation team.

66

Organisations registered for Trustee and Skills Match

43

Individuals signed up to Trustee Match

4

Time to Talks, 4 Time to Listens, 4 conferences, 4 seminars 4 workshops delivered in house or in partnership

3

Training programmes delivered in house or in partnership

Trustee Match's focus is on supporting first-time board members on the path to trusteeship.

Left to Right:
Rob Laycock, founder of Yes We Can, facilitating a Trustee Match event
Danni Gilbert and Mandy Baker from Sail Creative, delivering a training workshop

Shining a light on vital issues

This year, the Community Foundation published two reports as part of its Third Sector Trends study (TST) which looks at the current state of the community and voluntary sector and the funding environment in which it operates. This is to be followed by a further report on inequalities and voluntary sector leadership, along with new Vital Issues reports focusing on key areas of inequality within the Foundation's area of benefit.



Professor Tony Chapman of St Chad's College, Durham University authored the two TST reports. Drawing on research involving 30 regional and national funders, The Strength of Weak Ties explores issues such as the importance of trust between funders and grantees, the challenges of place-based funding and how foundations work most effectively together. Third Sector Trends in North East England 2020 is informed by a major survey of the regional sector in which over 1,000 organisations participated. It presents a comprehensive picture of the field and its workforce, its funding and financial health, its relationships with the public and private sector, and its social impact. Although realistic about the new challenges ahead, Professor Chapman draws on the long-term trends and learning from TST since 2009 to strike a note of optimism. He says: 'If I am convinced of anything, in these enormously difficult times, it is this – civil society is here to stay.'

The next TST report on equalities and leadership in the third sector will look further into the make-up of senior staff and Boards, and whether it reflects the growing diversity of the region. Meanwhile, the Vital Issues equality and diversity reports will help to inform the thinking of donors and other funding bodies by examining the experience of women, people with disabilities and members of the Black, Asian and minority ethnic, and the lesbian, gay, bisexual and transgender communities in the North East. As with previous research work it has produced, the Foundation is clear that these reports are meant to start conversations, which must include the voices of the communities concerned at the front and centre. The issues raised are likely to challenge the Community Foundation to further action: it seems clear already that many people in the North East are excluded from the opportunities that many of us take for granted.

'If I am convinced of anything, in these enormously difficult times, it is this – civil society is here to stay.'

Of course, this year has been exceptional due to COVID-19. Alongside Brexit, which is accepted will bring short term economic difficulties, the pandemic will amplify the difficulties of the third sector and the communities it serves, and in particular those experiencing prejudice or discrimination. The Community Foundation has begun to map the implications of these developments in the above publications. In 2021, however, it will take full stock of the situation in an updated Vital Signs North East report.

Left:
Professor Tony Chapman of St Chad's College, Durham
author of Third Sector Trends

... many people in the North East are excluded from the opportunities that many of us take for granted.

Our funds

These pages list our current funds by type, donor category and whether they have been set up on an endowment or annual basis.

Vital community funds

Through our unrestricted Vital Community Fund the Foundation's trustees have the flexibility to tackle the region's most pressing issues now and in the future. We also have dedicated Vital Funds (established with Community First match) for each of our local areas. Donors can choose to establish an unrestricted named fund which supports the Vital Community Fund or one of the area funds. Or they can make an unrestricted gift of any amount at any time to one of the existing funds.

Named Vital Funds set up by individuals and families	
Anonymous L Fund	Mitford Fund for Northumberland
Crosshatch Fund	Sandra King Rainy Day Fund
Crozier Fund	Sutherland Fund
Esmée Slattery Acorn Fund	Templeton Fund
Ian and Jane Gregg Fund	Tony Follows Legacy Fund
Named Vital Funds set up by businesses	
Tolent Fund	Tyne Tees Television Fund
Named Vital Funds set up by charities/trusts	
Greggs Fund	Sir James Knott Trust Fund

Collective giving funds

These funds bring together people with a shared interest who want to pool their donations to make a bigger difference to their chosen causes or communities. Collective giving endowment funds start with £25,000 or annual funds with £10,000. If donors are involved in recommending grants personally or through a panel, collective giving funds start at £50,000 for endowment or £30,000 for an annual fund.

Collective Funds	
Asian Fund	Northern Angel Fund for Berwick
Dawn Brown Fund	Tyne and Wear High Sheriff Fund (including Community First)
Coronavirus Response and Recovery Fund NEW	Vital Funds for Northumberland, Newcastle, North Tyneside, Gateshead, South Tyneside and Sunderland (including Community First)
The Giving Network	Women's Fund (including Community First)
High Sheriff of Northumberland Fund	Young Musicians Fund
Local Environmental Action Fund	
North East Fund for the Arts (including the Pen & Palette Club Fund)	

Operating funds

These funds support the costs of our charitable activities. Named operating endowment funds can be started with £10,000. One-off or annual gifts of any amount can be made at any time to support our work.

Operating Funds set up by individuals and families	
Ronald Edward William Murray Fund	
Operating Funds set up by charities and trusts	
Hadrian Trust Fund	

Field-of-interest funds

These donors use funds to support a particular place or cause but without being hands on with their giving. We select groups that match their interests. Field-of-interest endowment funds can be started with £25,000. Annual field-of-interest funds start at £10,000.

Funds set up by individuals and families	
Burnell Family Funds (including Community First)	Josephs Family Fund
Brian and Margaret Thompson Fund NEW	June King Fund
Christopher Beadle Fund	Kellett Fund
Combatting Isolation Fund (annual fund)	Langley Family Acorn Fund
Daisy Marr Fund	The Lawrence Campbell Community First Fund
Express Enterprise Fund	Linden Family Funds (including Community First)
Fausta and Rosemary Community First Fund	The Muriel Campbell Fund
FB and PFB Lough Fund	Pamela Denham Grassroots Fund
George and Peggy Fund	People of Ward Hadaway Fund
Grigor McClelland Funds (including Community First)	Prime Fund
Hillside Acorn Fund	The P Z Acorn Fund
The HunterPemberton Community First Fund	Ivy and Gilbert Purvis Fund
JesDesStaff Fund NEW	Spriggs Family Acorn Funds (including Community First)
	Tyne & Wear Grassroots Fund
Funds set up by businesses	
Akzo Nobel Funds (including Community First)	Newcastle Brown Ale Fund
Canford Audio Fund	North East Brewers Fund
Enviresearch Fund (annual fund)	Northumberland Group Fund
JPMorgan Fund	Rolls-Royce Fund
	Vaux Fund
Funds set up by charities and trusts	
Abbot Memorial Fund	Joseph Brough Charitable Trust Fund
Ashington Community Development Trust Fund	Lady Noble Memorial Fund
Chapman Fund	North Tyneside Fund (annual fund)
Dickon Trust Fund	Roland Cookson Community Fund
John Bell Fund	Rose Joicey Fund
	RW Mann Fund

Donor-advised funds

These donors are actively involved with their funds by choosing groups to support based on our research and the requests we receive. They can also nominate charities and set up a fund advisory panel. Donor-advised endowment funds can be started with £50,000. Annual donor-advised funds start at £30,000.

Funds set up by individuals and families	
Abigail and Stephen Crampton Fund	John D Fund
Adderstone Fund	Johnnie and Tricia Smith and Family Fund
Adrian and Ingrid Gifford Acorn Fund	Kerry Funds (including Community First)
AJM Acorn Fund	Lady Betty Martin Fund within the North East Fund for the Arts
Alan Morse Grassroots Acorn Fund	Leech Challenge Fund
Andrew and Charlotte Dixon Fund	Lendrum Family Community First Fund
Anonymous R Fund	Lily Matthews Fund (annual fund)
Appletree Fund	Lucy Winskell Fund
Barnes Fund	Margaret and Dorothy Gordon Memorial Fund
Barry and Faga Speker Fund	Matthew Ridley Acorn Fund
Bellingham Fund	Maudslay Family Fund
Blackett Family Community First Fund	Mark and Ian Wilson Family Fund
Ron and Louise Bowey Funds (including Community First)	McIntosh Fund
Brian Roycroft Fund including the Tessa Hide Fund	Michael and Christine Heppell Fund
Carolyn and Tony Brookes Fund	Milburn Briel Fund NEW
Carrie Reay Grassroots Fund	Nancy Barbour Award Fund
Carroll Savage Fund	Nash Fund
Chrysalis Fund	NEF Grassroots Fund
Curtin PARP Fund	North East Endowment for Musical Traditions Fund
Daphne and Martin Cookson Fund	Out and About Fund
David and Gitta Faulkner Fund	Pamela and Dorothy Denham Funds (including Community First)
Dream Jar Fund	Patch Fund
Duncan and Sarah Davidson Fund	Pea Green Boat Community First Fund
Edwin John Easydorchik Travelling Scholarships Fund	Percy Family Fund
Elgon Fund	Platten Family Funds (including Community First)
Emma Newton Fund	Proudfoot Family Fund
Evangelical Fund	Readman Family Funds (including Grassroots and Community First)
Fogo Funds (including Community First)	Readman Foundation Fund (annual fund)
Geoffrey and Ann Purves Fund	REEDS Funds (including Community First)
Groves Family Fund	Riddell Family Community First Fund
Guy Readman Endowment Fund	Riding Grange Grassroots Fund
Henderson Family Acorn Fund	Sara Alexandra Bernstone Fund
Heyman Travelling Scholarships Fund	Shipleigh Family Acorn Fund
Hokey Cokey Funds (including Community First)	Shobha and Triloki Srivastava Funds (including Community First)
Hoult Family Funds (including Community First)	Sir Tom Cowie Fund
l'Anson Family Fund	
If Only... Fund	
Jackie Haq Fund	

Funds set up by individuals and families	
SJB Fund	Thornton Family Grassroots Fund
Smail Family Fund	Three Valleys' Fund
Sowler Family UK Charitable Fund	Treeline Fund
Speke Family Acorn Fund	Vicky F Grassroots Fund
Squires Foundation Fund	Watkin Family Fund
Star Fund	Weightman Fund
Storey Family Grassroots Acorn Fund	Welch Family Fund
Strachan Family Grassroots Fund	Wide Open Road Fund NEW
Sue Wilson Acorn Fund	William Leech Charity Fund
Suz Grassroots Fund	Willis Charitable Fund
Ted Weekes Fund	Winter Family Fund
Tess Fund	
Funds set up by businesses	
Amec Foster Wheeler Fund	P&G Fund
Bellway Fund	Pattinson Estate Agents Fund
EDF Renewables Blyth Offshore Demonstrator Wind Farm Community Benefit Fund (annual fund)	Port of Tyne Community Action Fund (annual fund)
EDF Renewables Green Rigg Wind Farm Community Benefit Fund (annual fund)	PricewaterhouseCoopers Fund
EDF Renewables Barmoor Wind Farm Community Benefit Fund (annual fund)	Ringtons Funds (including Community First)
Fergusons of Blyth Fund	RWE Renewables Kiln Pit Hill Wind Farm Community Benefit Fund
Gateshead Housing Company Community Fund (annual fund)	RWE Renewables Middlemoor Wind Farm Community Benefit Fund
John Laing Fund	Square One Law Fund
Muckle Fund	Vattenfall Wind Power Ray Wind Farm Small Grants Fund (annual fund)
Newcastle Building Society Community Fund	Ventient Sisters North Steads Wind Farm Community Benefit Fund (annual fund)
North 150 Fund (annual fund)	Virgin Money Endowment Fund
Northern Powergrid Fund	Ward Hadaway Fund
Northumbrian Water Fund	
Funds set up by charities and trusts	
Barley Hill Fund	The George Cringle Scholarship Fund
Berwick Academy Endowment Fund	G S May Family Fund
Capt. C.D. Leyland Fund	Latterford Fund
Charles Robert Bell Fund	Northumberland Village Homes Trust Fund NEW
Coquet Fund (annual fund)	Pargiter Trust Fund NEW
CrecheMobile Fund NEW	Robert Wood Trust Fund
Culture Bridge Fund	Sunderland Industrial & Reformatory School Fund
David Dockray's West End Young People's Fund	The Wellesley Trust Funds (including Community First)
FARNE Fund	
Frederick Milburn Fund	

Designated funds

These donors select one or more charities a year to support from their funds. We make sure the organisations benefiting stay on track. Designated endowment funds can be started with £25,000. Annual designated funds start at £20,000.

Funds set up by individuals and families

C H Wood Fund	Joy Higginson Fund
David Goldman Awards	Moor Fund
Frank Acfield Fund	St Cuthbert's Fund
George Loggie Fund	Stuart Ayre Fund
Jane Robertson Alnwick Fund	Taylor Fund
Jeremy Beecham Schools Fund	

Funds set up by businesses

Bonas Machine Company Fund

Funds set up by charities and trusts

Allison Greenlees Continuation Fund	Fred Clay Fund
Bird Family Fund	Roland Cookson Fund
Carr-Ellison Charitable Trust Fund	

Agency endowment funds

These charities have funds at the Foundation which provide continuing income for their work. Agency endowment funds can be started with £100,000.

Agency Endowment Funds

Enid Blyton Fund for Seven Stories	Prudhoe League of Friends Fund
Evening Chronicle Sunshine Fund	Sage Gateshead Fund
Northumberland Wildlife Trust Fund	Tiny Lives Fund

Foundation projects and partnerships

These are the Foundation's own knowledge and leadership projects, and the programmes we run in partnership with other funders regionally and nationally.

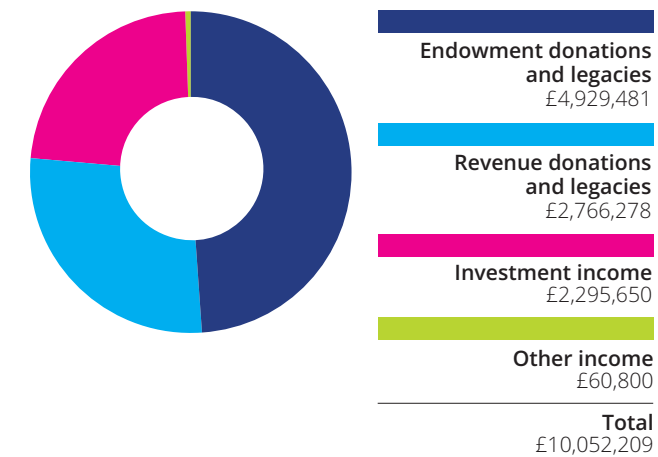
Foundation projects and partnerships

Community Infrastructure Levy Fund (CIL) - in partnership with Gateshead Council NEW	NET DCMS Big Night In match fund – in partnership with the National Emergencies Trust, UKCF and the Department for Culture, Media and Sport NEW
Fourteen – in partnership with Spirit of 2012 Trust and UKCF	Newcastle Culture Investment Fund – in partnership with Newcastle Council
Gateshead Thrive Fund – in partnership with Gateshead Council	North East Social Investment Fund – in partnership with Big Society Capital, Esmée Fairbairn, Joseph Rowntree and Northstar Foundation.
Growth and Resilience Fund – in partnership with County Durham Community Foundation, Northstar Foundation and the Mercers Company, with support from a private family donor	Third Sector Trends Study
Henry Smith Charity	Vital Signs
NET Coronavirus Appeal Fund – in partnership with the National Emergencies Trust and UKCF NEW	Youth Social Action – in partnership with UKCF and #iWill

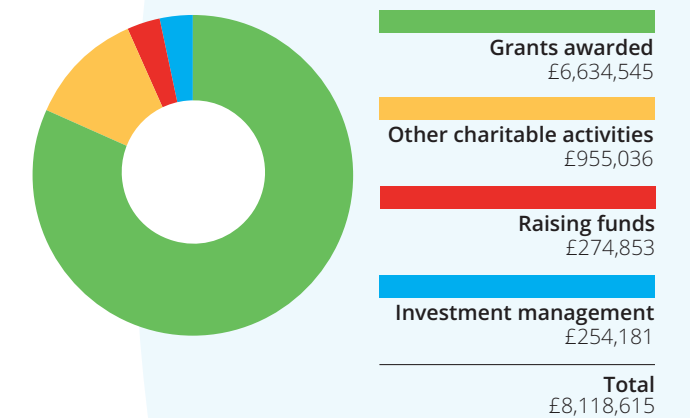
Summary of our finances for 2019-20

The charts below show our income, expenditure, assets and running costs for the year.

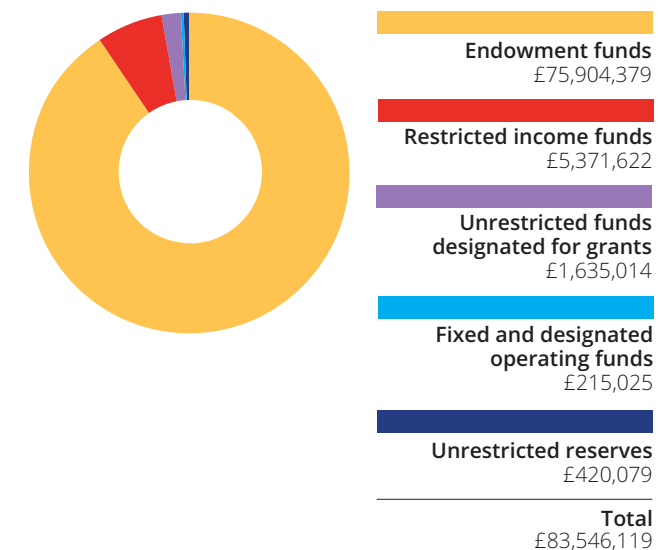
Our income



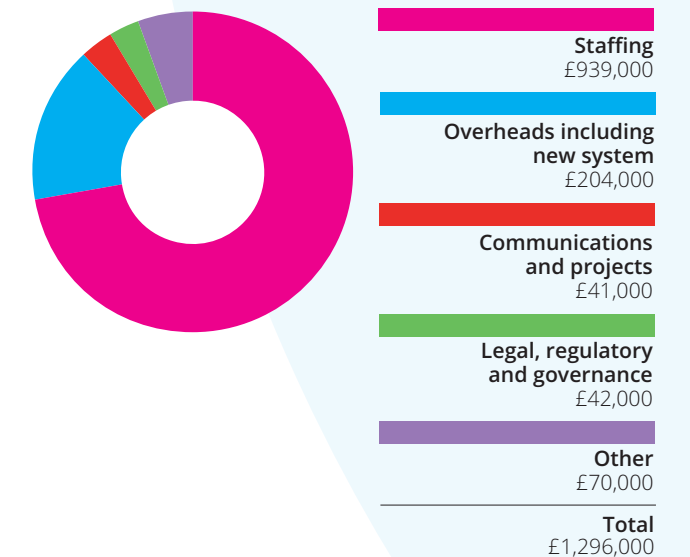
Our expenditure



Our assets



Our running costs



Rathbone Investment Management, Investec Wealth & Investment Management, CCLA Investment Management and Brewin Dolphin managed our investments in line with the policy agreed by our Board of trustees. The Covid-19 pandemic had a significant impact, and our endowment value fell from £81.2m in March 2019 to £75.9m in March 2020. Given the very difficult market conditions, the Board were satisfied with overall performance which was ahead of the benchmarks we set. The unrestricted operating reserves at the year-end were slightly below the range set out in our policy.

Full financial statements for the year ending 31 March 2020 were approved by our Board on 15 September 2020. Copies of these, and our investment policy, are available on our website or by contacting our office www.communityfoundation.org.uk/about-us/resources

Our grants facts and figures

We award grants through nearly 300 different funds set up at the Community Foundation by people and organisations who want to make a difference. Through their generosity, we invest in effective voluntary groups and provide support to individuals.

Overview

1,256 grants totalling £6,634,545 were made.

There were 935 external grant applications and 271 donor-nominated or designated grants.

1,555 grant applications received

675 groups received support

74 individuals supported

The average grant size was £5,282

53% success rate for external applications

47% of the total (£3.1m) was funding to continue work we'd previously supported

179 grants, 7% of the total awarded, were to organisations entirely new to us

54% of the total (£3.6m) was core funding

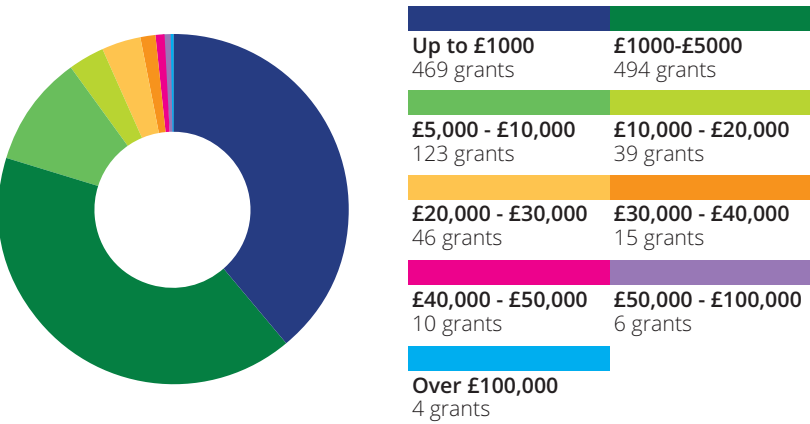
The data in the following tables and charts relates to our net grant figures after any that were cancelled or returned, and does not include 11 Fred Clay grants totalling £3,790

Vital signs area benefitted

Vital Signs Theme	Total
Arts culture and heritage	£1,558,202
Environment	£200,113
Fairness and inequality	£741,269
Healthy living	£1,551,222
Housing and homelessness	£129,992
Learning	£605,004
Local economy	£40,840
Safety	£110,826
Strong communities	£1,539,266
Work	£154,021
	£6,630,755

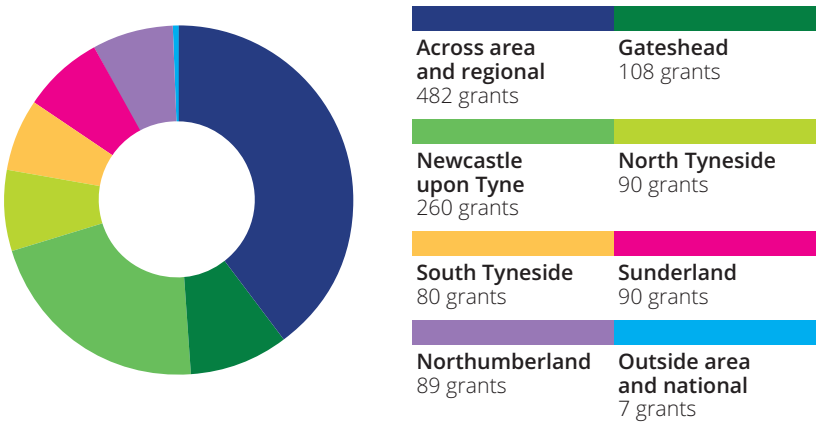
Amount awarded

Amount	Total awarded	% of total
Up to £1,000	£308,252	5%
£1,000 - £5,000	£1,416,880	21%
£5,000 - £10,000	£1,056,850	16%
£10,000 - £20,000	£603,818	9%
£20,000 - £30,000	£1,174,249	18%
£30,000 - £40,000	£511,384	8%
£40,000 - £50,000	£475,744	7%
£50,000 - £100,000	£354,200	5%
Over £100,000	£729,378	11%
	£6,630,755	100%



Places reached

Area	Total Awarded	% of total
Across the area and regional	£3,023,708	46%
Gateshead	£405,970	6%
Newcastle upon Tyne	£1,675,233	25%
North Tyneside	£524,555	8%
South Tyneside	£338,726	5%
Sunderland	£373,525	6%
Northumberland	£230,247	3%
Outside area and national	£58,791	1%
	£6,630,755	100%



Below:
Older People Art sessions at Kirkwhelpington Art Group



Our people

Our trustees

HONORARY PRESIDENT
His Grace the Duke of Northumberland

HONORARY VICE-PRESIDENTS
Kate Adie OBE, Lord Beecham, Rt Hon. The Lord Beith, Carol Malia DL, John Squires OBE DCL DL, Hugh Welch, Sue Winfield OBE (the Lord-Lieutenant of Tyne & Wear) and Mike Worthington OBE.

PATRONS
Dame Margaret Barbour DBE DL, Ron and Louise Bowey, Tony and Anne Platten, Lyn Shears, Sir Nigel Sherlock KCVO OBE.

Fiona Cruickshank OBE [1]
Chair: Business owner and angel investor

Geoff Hodgson [2]
Vice Chair: Business owner and non-executive director

Paul Farquhar [3]
Treasurer: Company director and accountant

Jill Baker [4]
Director of Development, Lloyds Bank Foundation

Lady Blackett [5]
Business owner and philanthropist

Michael Brodie [6]
Chief Executive, NHS Business Services Authority and (to December 2020) Public Health England

Robin Fry [7]
Chief Executive, North Tyneside VODA

Andrew Haigh [8]
Chief Executive, Newcastle Building Society

Claire Malcolm [9]
Chief Executive, New Writing North

Patrick Melia [10]
Chief Executive, Sunderland City Council

Dr Laura Warwick* [11]
Senior lecturer and consultant in service design

Neil Warwick OBE* [12]
Partner, DAC Beachcroft

Lucy Winskell OBE [13]
Pro-Vice Chancellor, Northumbria University

* No relation



Our staff

SENIOR EXECUTIVE GROUP

Rob Williamson
Chief Executive

Sandra King
Chief Philanthropy Officer

Sonia Waugh
Chief Finance & Operating Officer

Mark Pierce
Director of Community Knowledge & Funding

Adam Lopardo
Director of External Relations

PHILANTHROPY

Lisa Cappleman
Head of Giving and Philanthropy

Jon Goodwin
Senior Philanthropy Advisor

Elaine Holdsworth
Senior Philanthropy Advisor

Su Legg
Senior Philanthropy Advisor

FUNDING

Pete Barrett
Senior Programme Advisor

Nils Stronach
Senior Programme Advisor

Sue Martin
Programme Advisor

Ross Wilson
Programme Advisor

EXTERNAL RELATIONS

Jo Cundall
Senior Advisor, Culture

Colette Harrison
Development Officer, Sector Support

Ali Walker
External Relations Officer

OPERATIONAL SUPPORT

Mike Whitfield
Head of Operations

Dawn Porter
Executive Support Officer

Sarah Phillipson
Finance Co-ordinator

Adam Smith
ICT and Facilities Co-ordinator

Leanne Wilson
Grant Process Co-ordinator

Vivienne Rodgers
Office Administrator

Below:
Community Foundation
staff team



We are grateful for the support of our volunteer ambassadors and panel members. We also encourage individuals, voluntary organisations, public bodies and businesses to become involved in our network as members.

Your giving options

Philanthropy is a very personal act. The Community Foundation's team of expert philanthropy advisors is here to guide you so your giving is effective and rewarding.

We believe that anyone can be a philanthropist, so we offer options allowing you to give what you can, when and how you choose. Whatever route is best, we will match your generosity to causes that matter to you but also highlight what is needed in communities now and in the future. We have unrivalled reach to a huge range of groups in North East England, from the grassroots to the regional. As the most successful organisation of our type in the UK, you can be assured of our stability and that we'll be here to serve the people of the region for generations to come. And because we are a registered charity, you can donate tax efficiently when you give through us.

To find out more about your giving options, call Lisa Cappleman on **0191 222 0945** or email her **lc@communityfoundation.org.uk**

Giving during your lifetime

Getting started - Support a collective fund

If you're passionate about a particular cause or issue, but not ready to start a fund of your own, collective giving at the Community Foundation will connect you to people with a shared interest who want to pool their donations to make a bigger difference. We welcome one-off or regular gifts of any amount, or you can start a fund of your own to make your contributions.

Vital Community Funds help us to tackle our region's most pressing issues now and into the future. Vital Community Funds were the foundation of our Coronavirus Response and Recovery Fund with an initial match challenge of £200,000 that grew to over £1m in three months through the generosity of others. These funds also support our research and sector support work to ensure we can give the best support and advice to donors and grantees alike.

You can give to the Vital Community Fund for the area as a whole or there are Vital Funds for Northumberland, Newcastle, North Tyneside, Gateshead, South Tyneside and Sunderland.

As well as our Vital Community Funds, you can support funds which have been set up at the Foundation by our donors and partners to make a difference to particular causes and communities.

- The Asian Fund
- The Newcastle Culture Investment Fund
- The Coronavirus Response & Recovery Fund
- The North East Fund for the Arts
- The High Sheriff Funds for Tyne & Wear and for Northumberland
- The Northern Angel Fund for Berwick
- The Local Environmental Action Fund
- The Women's Fund
- The Young Musicians Fund

Left:
Corinne Devine from Women's Health in South Tyneside speaking at a Women's Fund event

Right - clockwise from top:
Giving Network members at the Giving Event 2019

Carroll Savage Fund. Hexham Youth Initiative

Kimberly McIntosh, Senior Policy Office, Runnymede, speaking at 'Can generosity change the world?'



Developing your giving - Join the Giving Network

The Giving Network is our entry level for like-minded professionals to come together, network, pool their giving, learn about vital issues in communities and choose causes to support. With an annual event, The Giving Network brings your donations alive. You can join the Giving Network for as little as £30 a month. And in your first year we match gifts on a £1 for £1 basis, meaning you can double your contribution.



Start your own fund

Starting a fund is quick and easy. It is like having your own charitable trust but without the hassle of administration and regulation. We'll advise you so your fund is tailored to your wishes and circumstances. Once the fund is ready to make grants you can be part of the recommendation process or leave it up to us, it's up to you. Either way you'll get regular feedback on how you've made a difference.

- **Endowment funds:** your gift is invested to set up the fund, with the revenue it generates every year going to support your causes.
- **Annual funds:** your gift is kept as cash and goes to support causes in the year ahead. To keep the fund going, you need to make a gift every year.

Leaving a lasting legacy

You can leave a legacy gift to go on helping your community for generations to come. By naming the Community Foundation serving Tyne & Wear and Northumberland as the beneficiary of your gift without restrictions, you give us the flexibility to support important causes and respond to changing needs in our area's future. You can also leave a gift of any size to support a particular cause or community through one or more of our collective giving funds. If you leave a gift of £10,000 or more in your Will, you can set up a fund within our endowment.



During her lifetime Jane Carroll was a member of the Community Foundation and passionate about supporting smaller charities and community organisations based in rural Northumberland. She left a gift in her Will to create an endowment fund to support such groups and was able to agree the purpose of the fund with us during her lifetime. She named her close friend and nephew as advisors to the fund after her death. The Carroll Savage Fund has supported Hexham Youth Initiative with a grant towards its core running costs to continue to support disadvantaged and marginalised young people, and Let's Get Growing based at Minsteracres in West Northumberland towards its therapeutic activities based around horticulture for people with mental health issues.

Advisors

Auditors: MHA Tait Walker

Bankers: Barclays Bank plc

Investment Managers: Rathbone Investment Management Limited, Investec Wealth and Investment Limited, CCLA Investment Management Limited and Brewin Dolphin Limited.

Solicitors: Muckle LLP

Financial information and grants statistics in the Yearbook relate to the financial year to 31 March 2020. All other information has been updated to the time of going to press in October 2020.

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Please note: photographs were taken before social distancing came into effect

Cover image: Voices Of Virtue Gospel Choir at 'An Evening of Diverse Arts and Culture' as part of #PoweredByPhilanthropy2019 by Gilbert Johnston Photography.

Community Foundation serving Tyne & Wear and Northumberland

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🐦 @CFTyneWearNland

f CommunityFoundationTyneWearNorthumberland

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Limited Company No. 2273708

Details of the Community Foundation's Privacy Policy can be found on our website.



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GIVING FOR LOCAL GOOD



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