



**Backing the
brilliant work
of local charities**

Serving Tyne & Wear and Northumberland
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Welcome from the Chair and CEO

This Yearbook comes out at a time when we are beginning to see optimistic signs of recovery from the immediate effects of Covid-19. But there will be long-lasting impacts on people and communities, especially those already experiencing disadvantage.

At the Community Foundation, we have played our part in the pandemic response, marshalling nearly £3 million for local charities and community organisations through donors and partners, including the National Emergencies Trust. The lessons learned – of the importance of core support, of trusting organisations on the frontline, and of bringing people together around a common cause – will be shaping our work for years to come.

Our strategy to 2025 sets out the big goals we want to achieve across philanthropy, funding, research and our own accountability. As well as a renewed focus on diversity, equity and inclusion, we will be taking a responsible investment approach with our endowment. We will report further on that next year. We are also returning to our home at Philanthropy House and welcoming visitors again. But there'll be a fresh approach built on the pandemic's lessons, with more webinars, virtual grant panels and remote working all in the mix.

It's a time of change for us. Fiona passes the baton as chair to Phil Moorhouse whom the Board has appointed as her successor following an open recruitment. The staff and trustee team look forward to working with him. We also say goodbye and thank you to Neil Warwick OBE, who is retiring from the Board after six years' service, and to Jon Goodwin who has left the team to take up a new role at the Newcastle Hospitals Charity.

As ever, our deep gratitude goes to our donors, grantees, partners and members whose support makes all our work possible.

Fiona Cruickshank OBE, Chair
Rob Williamson, CEO



Farewell from Fiona...

When I joined the Community Foundation's Board in 2011, I didn't imagine I'd be there for 10 years, let alone serving five as chair! But the Foundation is a special place: an organisation where lifelong – and cross-generational – relationships are the norm, and where roots go deep into communities.

I arrived knowing the organisation as a donor, but I leave with an even bigger passion for the difference philanthropy makes and the vital role the Foundation plays in growing giving to support local causes. I've strived to make a difference of my own as chair – focusing the Board's efforts, developing the executive team, and challenging a few orthodoxies along the way. Sometimes that's meant letting go of some cherished activities; sometimes it's meant trying new things and running with those that work.

I'm especially proud to reflect on how we stepped up during the pandemic – proving, if it were needed, the essential role the Foundation plays. I want to thank everyone who's been on the Board with me for your energy, commitment and friendship. And I want to commend the team who have made serving as chair a joy and a privilege – but with a special thanks to Rob for being a great CEO to work with. I'm delighted to be succeeded by Phil who I know will bring his own style and focus to the role.

Fiona Cruickshank OBE

"I'm especially proud to reflect on how we stepped up during the pandemic – proving, if it were needed, the essential role the Foundation plays."



... and hello from Phil

It's a great pleasure to be joining the Community Foundation as chair of trustees. I'm a great admirer, having seen the organisation's work first-hand during my time as chair of Newcastle Building Society. There we engaged with the Foundation as the perfect vehicle for reaching causes which are not always as visible as the larger charities.

I've also become more deeply involved personally through a fund my family and I have set up in memory of our daughter, Louise.

I have lived and worked in North East England all my life. So, I am very much looking forward to putting my passion for this place, alongside my knowledge and networks, to good use, working with the wider trustees and staff team.

I'd also like to thank Fiona for her warm welcome and support as she hands over the reins. She has been an exemplary chair for the Foundation, and it is a privilege to succeed her.

Phil Moorhouse

Far left:
Phil Moorhouse, Rob Williamson and Fiona Cruickshank OBE
Above left:
Fiona Cruickshank OBE, is leaving after 10 years on the Board
Above right:
Phil Moorhouse, the new Chair of the Board of Trustees

Our area...

Offers bright city-lights and the darkest of night skies. It's home to industries of the future like manufacturing, life sciences, digital and renewable energy. At its heart is a voluntary sector that employs **38,000** workers and **150,000** volunteers across the North East.



There are
1.47 million
of us



We are becoming more diverse:
15%
of our newborns will have a parent born outside of the UK



As a region we are becoming **more productive**, but not as quickly as in many other parts of the UK



3 in 4
of us earn more than the Living Wage



Our median age is

44



1 in 20
of us are making a difference in our communities as volunteers



20%
of our jobs were furloughed during the COVID-19 pandemic



Over **1 in 10***
of us have had COVID-19, with high mortality amongst older people, people with disabilities, ethnic minorities and the poor

*As at 24/9/2021



1 in 3
of us are very worried about COVID-19, especially about its impact on our finances

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 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.



We earn the trust of our donors and grantees by:

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.



We make sure we keep getting better by:

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.

www.communityfoundation.org.uk/about-us/our-values/

Communities where everyone belongs

The Coronavirus pandemic and global activism around Black Lives Matter have highlighted inequities and injustices in society. Philanthropy is not immune from challenge – something recognised by the Community Foundation. Its renewed focus on addressing diversity, equity and inclusion runs across grant-making, research, governance and advice for donors.



"We had started a conversation about philanthropy's role in addressing diversity, equity and inclusion in October 2019. And we'd committed to doing more to address racism, sexism, homophobia and other forms of prejudice and discrimination," explains Rob Williamson, the Foundation's CEO. "But, with the virus, our actions became more urgent given its disproportionate impact on Black and Asian communities, on people living in poverty, disabled people and those with mental health problems."

The Foundation used its knowledge of local charities and community organisations to target support where it would reach communities most affected. One such organisation was CREST (Compact for Race Equality in South Tyneside). The organisation aims to promote and foster racial and community harmony through assisting members of the borough's growing communities from diverse ethnic backgrounds. "CREST beneficiaries face variable barriers ranging from race and health to social and economic inequalities," says Shamiso Machaya, the Interim CEO. "To continue delivering activities within the Coronavirus pandemic, Black Lives Matter, Brexit and during the adversity of losing our founder, Shuley Alam, has been a challenging act that needed a radical shift from existing practice."

The Foundation provided funding, including a grant from its Growth and Resilience Fund that supported CREST's core costs during unstable times. "All the prevailing implications encountered this year were made easier by the grants received from the Community Foundation," Shamiso adds. "Every little bit of support helps the organisation to respond to individual and community needs thereby allowing them to transition from adversity to normal sustainable ways of life."

The Foundation used its knowledge of local charities and community organisations to target support where it would reach communities most affected by Covid-19.

The Foundation is also maintaining a longer-term lens through its policy and research. In October 2020, it published a special Third Sector Trends report on diversity in the leadership of charities and community organisations. It found that among both chairs and chief officers, disabled people, and Black, Asian and ethnic minority groups are under-represented. The report explores why some people might feel excluded from leadership roles, and what might attract more to come forward. And it raises the challenging question of whether organisations always cast their nets as widely as they should.

Then, in March 2021, the Foundation published reports on how philanthropy can better address diversity, equity and inclusion as part of its *Vital Signs* series. These look at the experience of women, physically and learning-disabled people and the Black, Asian and ethnic minority, and lesbian, gay, bisexual and/or transgender communities. The reports draw attention to levels of sexual violence and domestic abuse within the region, to long-standing health inequalities, and the wider impacts of how well people feel their lives are valued.



Left: The Percy Hedley Foundation have received several grants from the Community Foundation in recent years.

Above: Staff and volunteers at CREST (Compact for Race Equality in South Tyneside)

The Foundation has also taken time to look at its own practices. After listening to its membership, it published a new Diversity Equity and Inclusion policy. And, in July 2021, the Foundation became one of the first UK charitable funders to publish benchmarks for the diversity of its staff and trustees against which it will assess how well its people reflect the communities they serve.

"None of this means our conversations are over," Rob Williamson stresses. "But we hope what we are saying and doing shows not only our commitment to tackling inequalities and injustices, but also inspires others to do the same."

Leaving legacies of all shapes and sizes

Leaving a gift in a Will to the Community Foundation is a way for people to support the places, communities and causes that have been close to their hearts during their lifetime. Many named funds at the foundation have been set up in this way, but a growing number of funds have been set up with other meanings of 'legacy'.



Top: Mortal Fools supported by the Lady Betty Martin Fund.
Above: West End Refugee Service supported by the Pea Green Boat Fund.
Right: Support from the Emma Newton Fund helped Owen Kennedy attend Rambert School of Ballet and Contemporary Dance.

Some funds have been set up in memory of a lost loved one. The Emma Newton Fund, which marked its 10th anniversary in 2021, is an example. It was set up by family and friends of Emma who, aged 18, was tragically killed in a car accident during a heavy storm. Through fundraising efforts over the years, the endowment now stands at £100,000. As it has grown, the Fund has supported young people to take up opportunities in the arts, especially in music and dance – reflecting Emma's own talents and passions.

Robbie and Peggy Newton are Emma's parents. "The fund at the Community Foundation has really helped us over the last ten years," they explain. "We know Emma would have been thrilled to see the impact it's made. She was a very caring person and always gave her time to others, often teaching friends how to dance after school. It's fitting that the Fund is providing opportunities to other young people who, like Emma, love performing. We would like to thank the people of Hexham, the North East and all around the world, who have supported the fund since the beginning and helped us make a lasting impact on so many young people's lives."

Professor Sir Laurence Martin and his wife Betty spent many happy years living and working in the North East of England when Sir Laurence was Vice Chancellor of Newcastle University. In 2014, Sir Laurence set up the Lady Betty Martin Fund in Betty's memory to recognise her contribution to and passion for education and young people, and her affection for the region.

More recently the Louise Dalton Fund was set up by her family in memory of Louise who passed away in 2019. The Fund will grow and support learning and arts activities for families and children, and organisations helping people who are undergoing, or have undergone, treatment for cancer and their families. When Louise's children are older they will become involved in recommending grants from the fund in their late mother's name to continue the family philanthropy.

But what if you receive a legacy in the Will of a parent or relative and you want to do something meaningful with the money? You might want to commemorate their life, have something live on in their name, or perhaps the gift is above what you need to live comfortably. The donors to the Community Foundation's Pea Green Boat Community First Fund found themselves in exactly that position when the estate from their parents provided a sum that they felt was more than anything they needed personally. It gave them the opportunity to create a fund to support causes they felt passionate about: play, learning and creativity for young children to support their mental health, and activities that give a voice to, and raise awareness of, issues facing refugees and asylum seekers.

"It's great to be able to discuss with donors their wishes for their legacy gift, and even better when that turns into a fund being set up straight away!"

But those thinking of leaving a legacy don't need to wait to get involved in giving through the Foundation. The JesDesStaff Fund was set up following a conversation about leaving a gift in the donors' Will. In doing so, they were so inspired thinking about what the fund could be doing in the future, they made a donation to get it started straight away. They now have the option of adding to it further during their lifetime.

Lisa Cappleman, the Foundation's Head of Giving and Philanthropy explains. "It's great to be able to discuss and understand a donors wishes for their legacy gift, and even better when that turns into a fund being set up straight away! This means that our donors can see for themselves the difference their giving can make and gives them extra peace of mind knowing exactly how their legacy gift will continue to make a difference long after they are gone."

To find out more about legacy gifts and other giving options see p26-27



Giving back to their roots

Community foundations encourage giving for local causes, but donors don't need to live where they give. There is a growing trend at the foundation of far-flung philanthropy benefiting North East England.

This year, Dubai-based David Sadler helped to set up the John & Barbara Sadler and Jeanette Henderson Fund with his brother Richard, and Richard's wife Elizabeth. It recognises their parents and David's late wife. "I lived and worked in Durham for over twenty years before moving away, and I met my late wife Jeanette there; Richard and Elizabeth have lived in Northumberland for over three decades," David explains. "So, whilst we are all originally from different parts of the UK, when Richard suggested that we might jointly establish a fund with the Community Foundation to carry on the memory of our parents and of Jeanette, I was immediately on board. The North East means a lot to me, and I have deep memories of a region going through tumultuous social and economic change in the 1980s and 1990s. These changes have had lasting consequences, but I believe the region's spirit endures. We are all attracted to the ethos of the Foundation and to its work at a grass roots level, and I hope our Fund makes a contribution, however modest, to the important task of re-building community cohesion."



The Sadlers' example builds on others whose giving reflects their strong ties to the region. Irene Dorner worked internationally with HSBC before returning to live in London. Alongside her husband Jack, she set up a fund at the Foundation focusing on education and support, especially for girls and young women, and on financial literacy. "I was born in Middlesbrough and brought up in Whitley Bay," Irene says. "I was fortunate to have a loving, supportive family and a good state education and I have been far more financially successful than I ever imagined or intended. My roots are part of who I am. I believe in paying back and reinvesting my success, and that everyone should have the opportunity to realise their full potential. We want to support local projects which make a difference and, without the Foundation, would not know where to invest."

Renowned Sydney-based artist Edwin Easydorchik was born and brought up in Northumberland. He moved to Australia over 30 years ago after he was awarded the Sir James Knott Travelling Scholarship from the Royal College of Art. "My scholarship proved to be a pivotal moment in my career," Edwin explains. "I was 22, had never been abroad and my grand tour of Italy had a massive effect on my life and my art. It opened my eyes. It was important to me to give something back to young artists from North East England that are just starting out, so I set up the Edwin John Easydorchik Travelling Scholarship to give them the same experience and opportunities I'd had."

Derek Smail, now based near Nelson, New Zealand, created the Smail Family Fund with his father over 25 years ago. It supports organisations in Berwick and surrounding area including the Berwick Film Festival and The Maltings. "Although I moved to New Zealand some seven years ago, I still maintain close links to and affection for Northumberland, with the Smail Family Fund enabling a number of local organisations to receive annual or one-off grants," Derek says. "The Community Foundation is particularly helpful and, in addition to my local knowledge, provides me with suitable recommendations."

Elizabeth Sutherland Riney set up the Ivy and Gilbert Purvis Fund to honour her parents who were from South Shields but emigrated to the United States. Elizabeth tied those roots with her passion for the environment through the Fund. Its income is pooled with others into the Foundation's Local Environmental Action Fund. "As someone active in the environmental movement in the States, I was thrilled to see that there was already an environmental focus at the Foundation," Liz explains. "My goal is to help protect the environment and thereby improve healthy living conditions for the people of South Tyneside."

"While some of our donors have moved away, their hearts are still here, and they're passionate about giving back to the place they came from..."

People's ties to North East England stretch far and wide according to Sandra King, the Foundation's Chief Philanthropy Officer. "While some of our donors have moved away, their hearts are still here, and they're passionate about giving back to the place they came from. It's just as easy now for us to meet on Zoom with someone in New York as someone in New Hartley, and that means we can offer the same personal engagement no matter where a donor may live."

Left: Pictured from R to L: Richard and Elizabeth Sadler with their daughter Charlotte; David Sadler with Jeanette Henderson's son, David.
Below: The Smail Family Fund supported the Berwick Film & Media Arts Festival.



Being a better funder

A goal of the Foundation's strategy published in 2021 is to be even better at supporting the area's small, local charities and community organisations. Offering more core and long-term funding is a key to this, enabling organisations to respond to changing needs in communities.

Deploying the Foundation's discretionary funds to support core costs of organisations with a strong track record is one approach being taken. Since 2019, the Foundation has provided over £1m to charities and community organisations that address poverty, mental health and wellbeing, and diversity, equity and inclusion. Core cost grants are typically larger than normal, and often for more than one year. In Berwick-upon-Tweed and the surrounding areas of Northumberland, for example, eight organisations are benefiting from three-year grants of up to £30,000, from the Foundation's FB & PFB Lough Fund.

The Foundation's Coronavirus Response and Recovery Fund has also had a flexible focus. The majority of the £2.83m distributed is restricted only to ensure it supports vulnerable groups and helps organisations recover from the pandemic. Beyond that, grant recipients have significant leeway to achieve their goals as they see fit, with inspiring results.

Many Foundation donors are adopting a similar approach as part of their philanthropy. St Anthony's Youth Education and Support, a young people's charity in North Tyneside, has received several flexible grants from the Muckle Fund in recent years. Jodie Grieveson, the organisation's Youth Project Manager, is clear about their value. "Sometimes the restrictions that accompany 'project grants' don't allow us to respond to local situations and trends that we identify. They don't let us instigate projects that result from ideas that our young people have," she explains. "It can be difficult to explain to them that they have to wait until we hear back from funders before we can get started on something. The Muckle Fund grants are different."

The donors to the Foundation's Pea Green Boat Fund have been inspired to take a similar approach and, in 2021, the fund offered unrestricted support to organisations working with young children, including Baby Equipment Loans Service, Acorns North Tyneside, and Family Gateway. Donors are also increasingly willing to support groups on a year-to-year basis, rewarding grantees for their previous impact. The Squires Foundation Fund has made unrestricted grants to North Tyneside Carers Centre for three years in a row, each one based on high-quality feedback from a previous award. Claire Easton from the Carers Centre values this beyond the finances. "This ongoing support has been a real morale booster in these uncertain times, enabling us to provide really responsive services, while giving us the confidence that people believe in what we're doing," she says. "The fact that the continuation grants are made on the back of our previous feedback, rather than us having to complete additional application forms, represents a significant reduction of effort, freeing up time that we can better spend on supporting our beneficiaries."

The Foundation is also increasing support to organisations to build capacity and secure longer-term financing from funders and their own earnings. In 2021, the Foundation's Growth and Resilience Fund made grants across the North East worth £415,723 to support recipients around business development, service delivery and communications. Acknowledging the benefit of longer-term funding for organisational development, made more vital by the pandemic, the fund gave continuation grants to several organisations supported in previous rounds. One, RT Projects, had received previous funding to restructure and develop a more sustainable business model. The continuation grant from this year is being used to implement the new business plan. That has also been adapted to integrate new ways of working developed during the pandemic.

"We're pleased to be focusing more on core and longer-term support," says Adam Lopardo, the Foundation's Director of Community Relations. "This kind of funding made a huge difference to organisations during the pandemic, both financially and by demonstrating trust. We will be challenging ourselves and other funders to do even more of this in future."

Left: Young people from St Anthony's Community Centre enjoying paddle boarding.

"We're pleased to be focusing more on core and longer-term support"



A year in the life of sector support

The Community Foundation's work to encourage good governance and broker pro-bono support has been more vital than ever as charitable organisations adjusted to life in lockdown and developed new ways to support communities.

In April 2020, the Foundation partnered with solicitors Muckle LLP to host *Furloughing Workers in the Charitable Sector*. This webinar set the scene for a series of practical virtual training sessions from business and charity partners which now make up an important part of the Foundation's programme of sector support. Covering topics from running board meetings on Zoom to financial planning and property management, events are providing vital support for trustees and staff. Sylvia Copley, Chief Executive of Shiney Advice and Resource Project (SHaRP) in Sunderland explains. "I had already taken advice from our HR provider on key issues for our organisation, but it was very helpful to have that advice confirmed by Muckle at the Foundation's webinar."

Colette Harrison is the Community Foundation's development officer for sector support work. "It's a privilege to support charities to grow their skills, facilitate introductions and identify talented individuals who bring expertise and lived experience," she says. "Our offer evolves in relation to direct requests, training needs and offers of pro bono support. During the pandemic, we were able to quickly adapt to the needs of the sector and provide even more opportunities for individuals and businesses to give their skills and expertise."

To complement practical learning, the Foundation hosts webinars to hear from thought leaders on themes including diversity and inclusion. A library on the Foundation's YouTube channel now includes interviews with Trustee Match members and short films exploring effective trustee recruitment. Several organisations say they view these at board meetings to inspire discussion and fresh approaches to trustee recruitment and organisational development.

Offline, the Foundation sources expertise and brokers pro bono help and one-to-one support, responding to organisations' specific requests. Accenture's Digital Apprenticeship programme facilitated by the Foundation saw apprentices delivering support around CRM systems, accessible websites and social media. Skills 4 Work in Gateshead was among those benefiting. "We were delighted to be supported by an apprentice," says Tracey Wallace, its Development Manager. "Abbie worked with our young people to create a website that matched the needs of the charity and provided a clear and user-friendly platform."



The Foundation's trustee matching work is also expanding. Dan Britton, Head of Customer Operations at the NHS Business Services Authority, became a trustee with Wear Rivers Trust following a presentation given by the Foundation. "My experience of Trustee Match was very positive, and Colette was always available to help," Dan explains. "I'm now in my fourth month of being a trustee and have already supported positive decisions for my trust." Mandy Barker is another trustee matched, to Open Clasp Theatre. "The Community Foundation helped me understand the role of a trustee," she says. "They demystified the whole process and put me in touch with organisations based on my interests and ambitions. They have supported me greatly with queries throughout, building my confidence and networks."

As part of Small Charity Week in 2020, the Foundation hosted an event for first-time trustees and people interested in a governance role to explore the basics of trusteeship in an informal setting. Now a monthly event, the First Trusteeship gathering attracts attendees not just in the North East but across the UK. Hélder Costa is one of the new trustees and explains how he's benefited. "I am young and in the beginning of my career and Colette has helped me in understanding my strengths and all I can bring to a board."

"The Foundation remains flexible to the needs of those offering and requiring skills," Colette Harrison stresses. "Our positive experience of providing support virtually will have a lasting impact as we integrate face-to-face and online activities to provide greater choice and to engage the broadest range of people and organisations."

Left: Wear Rivers Trust which benefited from the Trustee Match Programme.
Above: Colette Harrison from the Community Foundation interviewing Louis Howell from 7PK about 'Inclusion and Diversity in Governance'.

"The Foundation remains flexible to the needs of those offering and requiring skills"



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	Pen and Palette Fund
Dawn Brown Fund	Tyne and Wear High Sheriff Fund (including Community First)
Coronavirus Response and Recovery Fund	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	
Northern Angel Fund for Berwick	

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	
Anne & David Parker Fund NEW	Ivy and Gilbert Purvis Fund
Burnell Family Funds (including Community First)	JesDesStaff Fund
Brian and Margaret Thompson Fund	Josephs Family Fund
Carrie Reay Grassroots Fund	June King Fund
Christopher Beadle Fund	Kellett Fund
Daisy Marr Fund	Langley Family Acorn Fund
Express Enterprise Fund	The Lawrence Campbell Community First Fund
Fausta and Rosemary Community First Fund	Linden Family Funds (including Community First)
FB and PFB Lough Fund	The Louise Dalton Fund NEW
George and Peggy Fund	The Muriel Campbell Fund
George Loggle Fund	Pamela Denham Grassroots Fund
Grigor McClelland Funds (including Community First)	Prime Fund
Hillside Acorn Fund	The P Z Acorn Fund
The HunterPemberton Community First Fund	Spriggs Family Acorn Funds (including Community First)
	Tyne & Wear Grassroots Fund
Funds set up by businesses	
Akzo Nobel Funds (including Community First)	JP Morgan Fund
Canford Audio Fund	North East Brewers Fund
Enviresearch Fund (annual fund)	Northumberland Group Fund
John Laing Fund	Rolls-Royce Fund
	Vaux Fund
Funds set up by charities and trusts	
Abbot Memorial Fund	Lady Noble Memorial Fund
Ashington Community Development Trust Fund	Newcastle Dispensary Relief in Sickness Fund NEW
Chapman Fund	North Tyneside Fund (annual fund)
Dickon Trust Fund	Roland Cookson Community Fund
John Bell Fund	Rose Joicey Fund
Joseph Brough Charitable Trust 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	CLOSED SEPT 2021
Barnes Fund	Lucy Winskell Fund
Barry and Faga Speker Fund	Margaret and Dorothy Gordon Memorial Fund
Bellingham Fund	Matthew Ridley Fund
Blackett Family Community First Fund	Maudslay Family Fund
Ron and Louise Bowey Funds (including Grassroots and Community First)	Mark and Ian Wilson Family Fund
Brian Roycroft Fund including the Tessa Hide Fund	McIntosh Fund
Carolyn and Tony Brookes Fund	Michael and Christine Heppell Fund
Carroll Savage Fund	Milburn Briel Fund
Chrysalis Fund	Nancy Barbour Award Fund
Curtin PARP Fund	Nash Fund
Daphne and Martin Cookson Fund	NEF Grassroots Fund
David and Gitta Faulkner Fund	North East Endowment for Musical Traditions Fund
Dream Jar Fund	Out and About Fund
Duncan and Sarah Davidson Fund	Pamela and Dorothy Denham Funds (including Community First)
Edwin John Easydorzhik Travelling Scholarships Fund	Patch Fund
Elgon Fund	Pea Green Boat Community First Fund
Emma Newton Fund	Percy Family Fund
Evangelical Fund	Platten Family Funds (including Community First)
Fogo Funds (including Community First)	Proudfoot Family Fund
Geoffrey and Ann Purves Fund	Readman Family Funds (including Grassroots and Community First)
Groves Family Fund	Readman Foundation Fund (annual fund)
Guy Readman Endowment Fund	Reeds Funds (including Community First)
Henderson Family Fund	Riddell Family Community First Fund
Heyman Travelling Scholarships Fund	Riding Grange Grassroots Fund
Hokey Cokey Funds (including Community First)	Sara Alexandra Bernstone Fund
Hoult Family Funds (including Community First)	Shibley Family Acorn Fund
l'Anson Family Fund	Shobha and Triloki Srivastava Funds (including Community First)
If Only... Fund	Sir Tom Cowie Fund
Jackie Haq Fund	
Jane Robertson Alnwick Fund	
John & Barbara Sadler and Jeanette Henderson Fund NEW	

Funds set up by individuals and families

Stephen Byers Fund	Thornton Family Grassroots Fund
Small 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
Sue Wilson Acorn Fund	Wide Open Road Fund
Suz Grassroots Fund	William Leech Charity Fund
Ted Weekes Fund	Willis Charitable Fund
Tess Fund	Winter Family Fund

Funds set up by businesses

Bellway Fund	PricewaterhouseCoopers Fund
EDF Renewables Barmoor Wind Farm Community Benefit Fund (annual fund)	Ringtons Funds (including Community First)
EDF Renewables Blyth Offshore Demonstrator Wind Farm Community Benefit Fund (annual fund)	RWE Renewables Kiln Pit Hill Wind Farm Community Benefit Fund (annual fund)
EDF Renewables Green Rigg Wind Farm Community Benefit Fund (annual fund)	RWE Renewables Middlemoor Wind Farm Community Benefit Fund (annual fund)
Fergusons of Blyth Fund	Vattenfall Ray Wind Farm Small Grants Fund (annual fund)
Muckle Fund	Ventient Sisters and North Steads Wind Farm Community Benefit Fund (annual fund)
Newcastle Building Society Community Fund	Virgin Money Endowment Fund
Northern Powergrid Fund	Ward Hadaway Fund
Northumbrian Water Fund	Wood Fund
Opencast Charitable Fund NEW	
P&G Fund	
Pattinson Estate Agents Fund	
Port of Tyne Community Action Fund (annual fund)	

Funds set up by charities and trusts

The 1989 Willan Charitable Trust Fund (annual fund)	Frederick Milburn Fund
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
Coquet Fund (annual fund)	The Pargiter Trust Fund (annual fund)
CrecheMobile Fund	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	

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	Moor Fund
David Goldman Awards	St Cuthbert's Fund
Frank Acfield Fund	Stuart Ayre Fund
Jeremy Beecham Schools Fund	Taylor Fund
Joy Higginson 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.

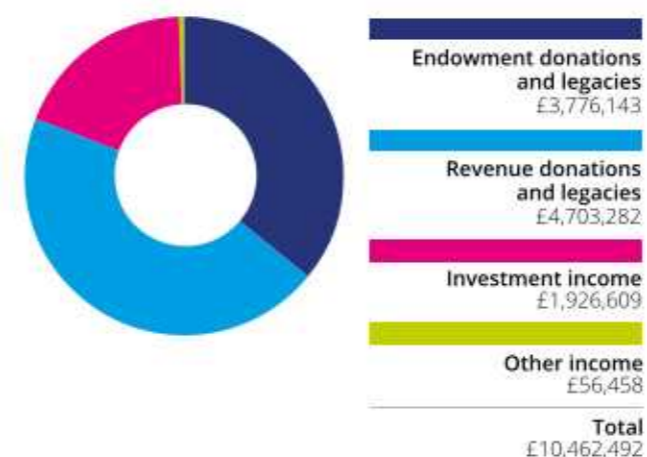
Foundation projects and partnerships

Community Infrastructure Levy Fund (CIL) - in partnership with Gateshead Council	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
NET Coronavirus Appeal Fund - in partnership with the National Emergencies Trust and UKCF	Vital Signs
NET DCMS Big Night In match fund - in partnership with the National Emergencies Trust, UKCF and the Department for Culture, Media and Sport	Youth Social Action - in partnership with UKCF and #iWill
	We also provide expertise and advice to the Bernicia Foundation, Ridley Family Charity and Shears Foundation.

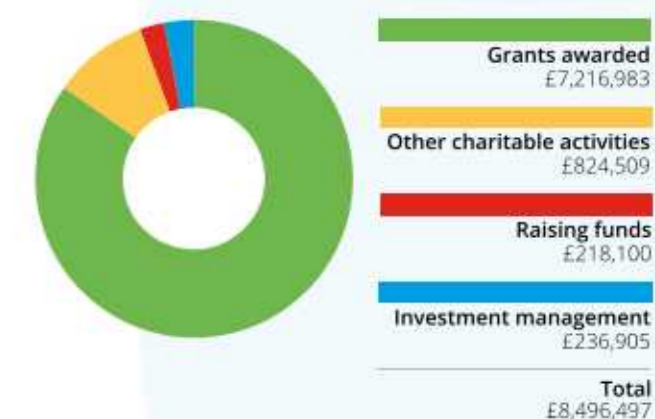
Summary of our finances for 2020-21

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

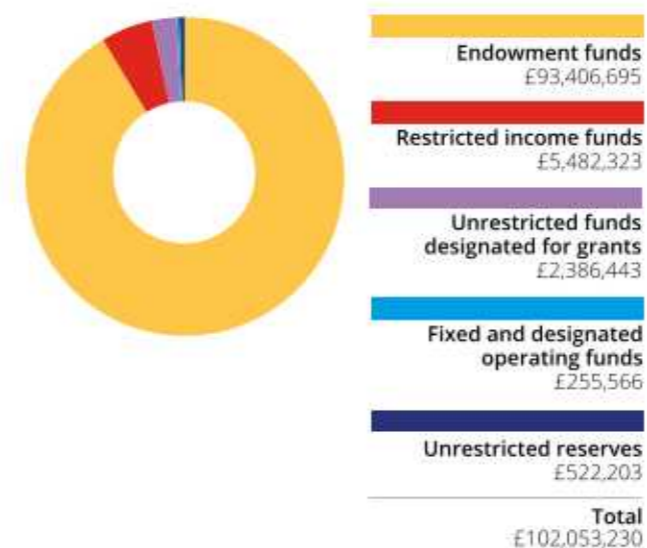
Our income



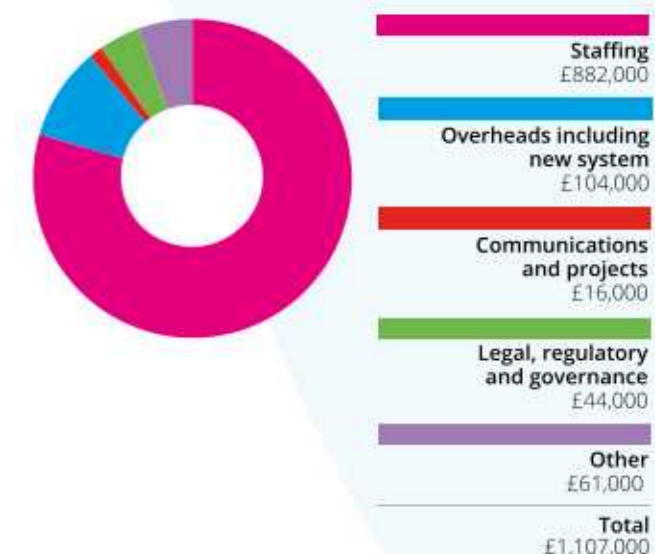
Our expenditure



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. Alongside significant gifts, market recovery meant the value of our endowment rose from £75.9m in March 2020 to £93.4m in March 2021. The Board was satisfied with performance which was ahead of benchmarks we set. The unrestricted operating reserves at the year-end were within the range set out in our policy.

Full financial statements for the year ending 31 March 2021 were approved by our Board on 21 September 2021. 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 grant facts and figures

The Community Foundation awards grants through nearly 300 different funds set up by generous people and organisations who want to make a difference.

Overview

1,328 grants totalling £7,208,024 were made

619 organisations and 80 individuals supported

£5,435 average grant

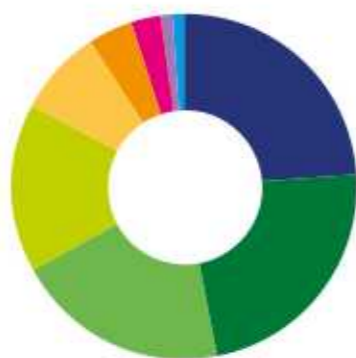
52% of the total (£3.7m) was core funding for organisations

45% of the total (£3.2m) was to continue work we'd previously supported

150 grants went to organisations new to us

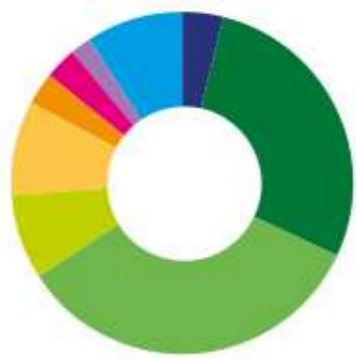
The data in the following tables and charts is for our net grant figures after any that were cancelled or returned. It does not include 9 Fred Clay grants totalling £3,010.

Causes supported



24%	Healthy living £1,700,625	23%	Arts, culture & heritage £1,635,252
20%	Strong communities £1,476,697	16%	Fairness & inequality £1,154,253
8%	Learning £599,899	4%	Safety £272,634
3%	Work and the local economy £216,759	1%	Housing and homelessness £88,710
1%	Environment £63,195		

Amounts awarded



4%	Up to £1,000 £271,817	28%	£1,000 - £5,000 £2,002,226
34%	£5,000 - £10,000 £2,447,660	8%	£10,000 - £20,000 £602,429
9%	£20,000 - £30,000 £678,605	3%	£30,000 - £40,000 £236,565
3%	£40,000 - £50,000 £185,024	2%	£50,000 - £100,000 £120,000
9%	Over £100,000 £663,698		

Places reached



23%	NE England-wide £1,662,594	4%	Tyne & Wear-wide £314,652
7%	Gateshead £508,091	20%	Newcastle upon Tyne £1,431,114
7%	North Tyneside £513,910	6%	South Tyneside £414,025
8%	Sunderland £589,578	21%	Northumberland £1,507,886
2%	County Durham £110,576	1%	Tees Valley £83,978
1%	Outside NE England £71,620		

People helped

Most of our grants – 387 totalling £2.3m (32% of our funding) – were to benefit the whole community of a place. Data on grants which were targeted to benefit people with specific characteristics is as follows.

Demographic characteristic	Amount	Number	% of amount	% of number
Children and young people	- Aged 5-11	288	15%	22%
	- Aged 12-17	417	22%	31%
	- Aged 18-24	366	19%	27%
Older people	£1.2m	170	17%	13%
Disabled people	£1.0m	184	14%	14%
Black, Asian and minority ethnic communities	£0.2m	38	3%	3%
Asylum seekers/refugees	£0.3m	40	4%	3%
Women	£0.4m	87	6%	7%
Lesbian, gay and bisexual	£0.02m	7	<1%	1%
Transgender	£0.02m	5	<1%	<1%

The above data do not add up to an overall total as grants may be categorised as supporting more than one group e.g. older women, or disabled 18-24-year-olds.

Below:

Author Simon Bartram launching the 'Reading Rocks Shed' at Tyneview Primary School, thanks to a grant from the Guy Readman Endowment Fund to The Children's Foundation.



Our people

Our trustees

HONORARY PRESIDENT

His Grace the Duke of Northumberland

HONORARY VICE-PRESIDENTS

Lord Beecham, Lord Beith, Fiona Cruickshank OBE, Carol Malia DL, Dr Hari Shukla CBE DCL DL, Dr Shobha Srivastava, John Squires OBE DCL DL, Hugh Welch, Sue Winfield OBE (the Lord-Lieutenant of Tyne & Wear), Gill Winter, Mike Worthington OBE.

PATRONS

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

CORPORATE PATRONS:

Newcastle Building Society, P&G, Ringtons

LEGACY PATRONS:

Douglas Kellett, Frank and Pat Lough, Ronald William Edward Murray, Guy Readman OBE, Trevor Shears OBE.

Phil Moorhouse [1]

Chair: Non-executive director and business 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

Anna Blackett [5]

Business owner and philanthropist

Michael Brodie [6]

Chief Executive, NHS Business Services Authority

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

Laura Warwick [11]

Senior lecturer and consultant in service design

Lucy Winskill [12]

Pro-Vice Chancellor, Northumbria University

Fiona Cruickshank and Neil Warwick retired from the Board at the 2021 AGM.



Our staff

SENIOR EXECUTIVE GROUP

Rob Williamson

Chief Executive

Sandra King

Chief Philanthropy Officer

Sonia Waugh

Chief Finance and Operating Officer

Adam Lopardo

Director of Community Relations

POLICY AND RESEARCH

Mark Pierce

Associate Director of Policy and Research

PHILANTHROPY

Lisa Cappleman

Head of Giving and Philanthropy

Elaine Holdsworth

Senior Philanthropy Advisor

Su Legg

Senior Philanthropy Advisor

Ross Wilson

Senior Philanthropy Advisor

Michelle Hardie

Philanthropy Advisor

Kevin Maloney

Philanthropy Advisor

COMMUNITY RELATIONS

Nils Stronach

Head of Grant Practice and Programmes

Pete Barrett

Senior Programme Advisor

Jo Cundall

Senior Advisor, Culture

Sue Martin

Programme Advisor

Colette Harrison

Development Officer, Sector Support

Ali Walker

External Relations Officer

Hamish Carter

Funding Co-ordinator

OPERATIONAL SUPPORT

Mike Whitfield

Head of Operations

Dawn Porter

Executive Support Officer

Sarah Phillipson

Finance Co-ordinator

Adam Smith

Systems and Facilities Co-ordinator

Leanne Wilson

Grant Process Co-ordinator

Vivienne Rodgers

Front Desk Administrator

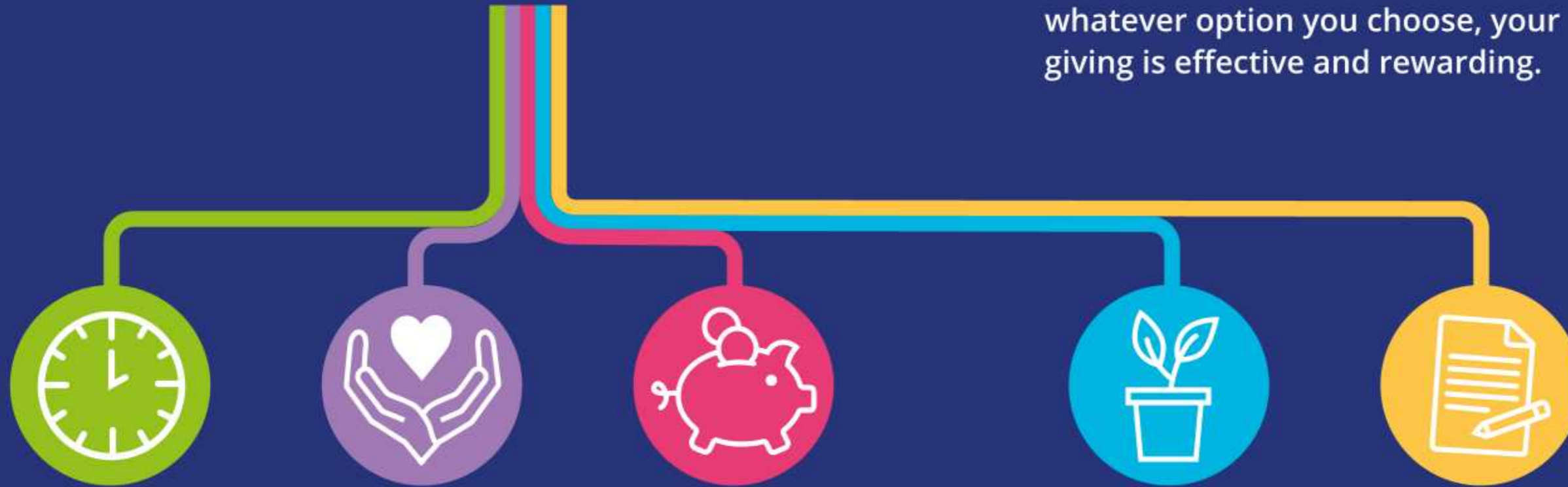


Left: Community Foundation staff team

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

Anyone can be a philanthropist and the Foundation's team of expert advisors is here to make sure that whatever option you choose, your giving is effective and rewarding.



Give time

If you want your philanthropy to be about giving your time and expertise, our Skills and Trustee Match programmes help you bring your passions and expertise to a local charity or community organisation by sharing your skills or joining the governing body.

See more about our sector support on pages 14-15

Give with others to a cause you're passionate about

If you want to back a particular place or cause, you can donate to a Community Foundation collective giving fund alongside other like-minded individuals. From the arts to environment, young people and women, to funds covering Northumberland, Newcastle, North Tyneside, Gateshead, South Tyneside and Sunderland, we have a fund for you. We welcome one-off or regular gifts of any amount.

See a list of the collective giving funds on p16

Join the Giving Network

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

Start your own fund

Starting a fund is quick and easy. It's like having your own charitable trust but without the hassle of administration and regulation. With an endowment, your gift is invested as capital and the fund's revenue supports your causes forever. With an annual fund, your gift is held as cash to distribute over the next year. We'll work with you to tailor your fund to your wishes and circumstances. And you'll get regular feedback on how you've made a difference.

Leaving a lasting legacy

You can leave a legacy gift in your Will of any size to help your community for generations to come. An unrestricted gift leaves us the flexibility to support changing needs in the future. You can also leave a gift to support a particular cause or area through our collective giving funds. Or, with a gift of £10,000 or more in your Will, you can set up your own named fund.

See more about the different types of legacies on pages 8-9

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

Below:
A fitness class at Gateshead Older People's Assembly.
Bottom:
Summer holiday activities at Sunderland Bangladesh International Centre.



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 2021. All other information has been updated to the time of going to press in October 2021.

Design and artwork: Lisa Kirkbride

Photography: Gilbert Johnston Photography; Percy Hedley Foundation; CREST (Compact for Race Equality in South Tyneside); Mortal Fools; West End Refugee Service; Owen Kennedy; The Sadler Family; Erika Stevenson for Berwick Film & Media Arts Festival; St Anthony's Community Centre; Wear Rivers Trust; Gateshead Older People's Assembly.

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

Cover image: Summer holiday activity day at Sunderland Bangladesh International Centre taken by Gilbert Johnston Photography.

Community Foundation serving Tyne & Wear and Northumberland

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f CommunityFoundationTyneWearNorthumberland

in cftynewearnland

Registered Charity No. 700510

Limited Company No. 2273708

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