



Community
Foundation

Yearbook 2022

Backing the
brilliant work of
local charities



Serving Tyne & Wear and Northumberland
communityfoundation.org.uk

Welcome from the Chair and CEO

The magic of the Community Foundation is we bring 'doers and donors' together to make a difference in our area. The giving in and grants out figures tend to grab most attention but we're also a hub, a connector and a convenor.

All sorts of approaches have their place. Whether we're enabling donors to support shared causes, garnering responses to collective responsibilities or pooling funds for a bigger impact. This Yearbook tells some stories which illustrate them. Of course, financial resources – giving, philanthropy and funding – are key. But so too are our trusted relationships, our knowledge and our networks.

We're publishing the Yearbook at a time of rising inflation and a cost-of-living crisis linked to energy and food prices. At the Community Foundation, we know that this will hit the poorest people the hardest – particularly as they spend a greater proportion of their overall income on energy. And more lower income households will likely experience poverty resulting from rising costs. Over the months ahead we will look at ways that we can provide even better support to grantees facing increased demands and costs, encouraging applicants to reflect inflationary pressures in their funding requests. And we will work with our donors to maximise the distribution of funds to respond to these difficult times.

We'll also focus unapologetically on continuing to build local philanthropy. We, alongside other community foundations in the UK, are calling for another endowment match scheme to incentivise more and better giving. We've had great success with such initiatives in the past. The big win is they grow the giving cake, rather than just shuffling around existing resources. And there are opportunities to fund this that don't impact on public sector budgets, for example through the release of new waves of dormant financial assets. To use the jargon of the moment, this supports 'levelling up'. But, most importantly, it would build community assets to benefit people and places now and for generations to come, no matter the priorities of the government of the day.



Over the months ahead we will look at ways that we can provide even better support to grantees facing increased demands and costs

Our brilliant staff and trustees are central to making all this work. There've been several changes in the team this year. Sandra King now heads up the Beaver Trust and Leanne Wilson looks after engagement and impact for Newcastle Hospitals Charity. Sue Martin and Vivienne Rodgers have retired after many years of service. Emma Holmes, Jacqueline Turner and Ged Robinson have joined us. And, returning to his native North East England from Detroit, Michigan, John Hollingsworth becomes our new Chief Philanthropy Officer.

At the Board too there is transition. Particular thanks go to retiring trustees Anna Blackett and Robin Fry, and to Geoff Hodgson who has served as our deputy chair for nine years. Lucy Winskell succeeds Geoff in that role. We're also delighted to welcome new trustees Sarah Glendinning, regional director of the CBI, and Fiona Standfield, chief operating officer of the Diocese of Newcastle and Hexham.

As ever, our deep gratitude goes to our donors, grantees, partners and members.

Phil Moorhouse, Chair



Rob Williamson, CEO



Left: Young people from the North Music Trust's 'InHarmony' group performing.

Below: D6: Culture Ltd's 'Contested Desires' walking refugees project visits Sycamore Gap on Hadrian's Wall.



Our area

Newly released data from the 2021 Census has revealed a decade of sluggish population growth in the North East. In Tyne & Wear and Northumberland, only Newcastle's population grew in excess of the national average whilst Gateshead, South Tyneside and Sunderland experienced an actual decline in numbers.

This trend is indicative of the long-term weaknesses within our regional economy. But now there are fresh challenges to face. In addition to ongoing difficulties associated with the impact of Covid-19 and the transition to a post-Brexit economy we must add the likely impact of the national cost-of-living crisis. This is likely to be painful for everyone in the region, but its effects will be most keenly felt by those on low incomes from work or benefits.



There are **2.6 million** people living in the North East (Census 2021)



The North East **population rose by 2%** since 2011, compared to a national average (exc. London) of 6%



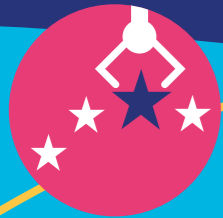
Hourly productivity in Tyne & Wear and Northumberland is just **85% of the national rate** (ONS 2019)



45,000 people are **paid at or below the minimum wage** in Tyne & Wear and Northumberland (Low Pay Commission 2021)



At **5.1%** the North East **unemployment rate remains the highest** in the UK (ONS, 2022)



It has been credibly estimated that there could be a **2.7% fall** in North East **manufacturing output** as a result of Brexit by 2030 (LSE/Resolution Foundation 2022)



920,786 have had Covid in the North East – the **highest rate in England** – with the highest mortality amongst older people, people with disabilities, ethnic minorities and the poor (UK Government 2022)



3% of people with Covid may experience **longer-term health issues**



Over **37,000** **emergency food parcels** were given to children alone by Trussell Trust Foodbanks in 2021/2022 (Trussell Trust)



Right: A street parade in Gilsland, Northumberland as part of the Queen's Platinum Jubilee celebrations, organised by Green Croft Arts.

Above right: Outside crafts with Equal Arts.

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.



Increasing impact by giving with others

Philanthropy can be a very individual journey for a donor, but opportunities arise where giving with others may have a greater impact. The Community Foundation has always used its insights to support and encourage collective giving. And, during Covid-19, many Community Foundation donors pooled funds, allowing for quicker, bigger and more impactful grants. In the past year, further initiatives have drawn on the lessons of these approaches.

The Community Foundation has encouraged donors to support holiday playschemes since highlighting their benefits in its 2019 *Vital Signs* report on food poverty. But 2022 was the first year that the Foundation trialled a pooled fund. It was a response to community organisations reporting that increased Government support for playschemes, although welcome, excluded children from poorer households who failed to qualify for support. So, the Foundation put a call out to its donors to contribute to a summer 2022 fund which could provide additional support. In total, 24 donors came together, providing £150,000 to 17 schemes.

2022
the first year the
Foundation trialled
a pooled fund for
playschemes

Alan and Ruth Briel of the Milburn Briel Fund at the Community Foundation describe why they took part. "We decided to make a small additional donation. In some ways we felt embarrassed at making such a small contribution, when the problem is so large. But it was wonderful when we heard that so many other donors had come forward, and together we had a substantial contribution that could make a difference across our region. Without the Community Foundation providing the knowledge and organisation, we're sure this would not have happened."

The impact on young people was immediate. One parent whose son and niece attended the Summer Camp at Gateshead Redheugh Football Club says: "Holidays are difficult not only to keep our children entertained at a low cost but also to provide them with regular affordable meals. This club covers all of that as well as keeping the kids in a safe and fun environment. Well done Redheugh for providing this opportunity and myself and the kids look forward to the next one."

The Playschemes Fund will now become a year-round initiative. Mark Pierce is the Associate Director of Knowledge and Research at the Community Foundation and leads on *Vital Signs* and helped develop the Fund. "The programme showcases what local philanthropists can achieve working together with our support," Mark explains. "But it also reinforces that time spent listening to grantees and communities – and using it to reflect on our practice as philanthropy advisors and funders – is never wasted."

In November 2021, the Community Foundation launched another initiative to promote a shared response to poverty. Based on work by Toronto Foundation, one of Canada's largest community foundations, the *Good To Give Guide* provides a short, curated list of trusted organisations tackling the most pressing challenges in communities.

Each month
Giving Network
members donate a
minimum of £30 –
which the foundation
matches - into a fund

The Guide offers donors the opportunity to pool funds in response, but more directly points them to featured organisations' own donation pages.

The Community Foundation's Director of Community Relations, Adam Lopardo, put the guide together. "We wanted to share our knowledge of great organisations tackling the cost-of-living crisis with anyone who wanted to give. That could be by giving to a fund at the Community Foundation as many did during the pandemic, but also those who wanted to keep their giving personal and direct. The call was for collective action to address the issue."

Dave Stafford of the JesDesStaff Fund at the Community Foundation explains why the Guide has gone down well with donors. "We have been thinking that we ought to try to help those in our area who will have been adversely affected by the changes to Universal Credit and the rising costs of food, petrol and heating. The Good to Give initiative was just the catalyst that we needed to spur us into action. We have chosen local charities that have links with the Foundation, knowing that our money is going to provide support when and where it is needed most."

2022 is also the fourth year of the Community Foundation's Giving Network, which uses a collective giving model to open up philanthropy to a new

generation of donors. Each month, network members give £30 or more – which the Foundation matches – into a fund. Once a year, they come together to hear from four specially selected organisations and decide where 'their' portion of the fund should go. In May 2022 the first in-person giving event since 2019 saw members support Box Youth Project, Curious Monkey, The Hextol Foundation and West End Women and Girls. Giving Network Member Paula Parks explains why The Giving Network is the right option for her: "I like to give money to charity but it's hard to give money to local charities. It's hard to find the right people. So, the Giving Network at the Community Foundation is a great way of putting my money to work."

24
donors

allocated
£150,000
to

17
summer
playschemes

Left:
Attendees at the Giving
Network Giving Event in
May 2022.

Right:
Young people preparing food
as part of the Pennywell Youth
Project summer playscheme.



Building partnerships with professional advisors

For nearly 35 years the Community Foundation has supported hundreds of generous people and businesses to give back to the region. But this hasn't been done alone. Professional advisors – lawyers, accountants and wealth managers – have been crucial partners in helping the Foundation grow giving and philanthropy for its area.

Whilst charitable giving is very common, it's often not spoken about openly. And, while philanthropy remains private, it's less likely to be seen as a 'social norm'. But, because they're already in a trusted role, professional advisors are perfectly placed to initiate a conversation about giving with their clients. As a result, philanthropy can be combined with people's business, financial, family and estate planning.

"There's no right or wrong time to bring up philanthropy," says Lisa Cappleman, the Community Foundation's Head of Giving and Philanthropy. "A client could be at any stage of their life. Younger entrepreneurs may want to build social good into their growth plans. Established business owners may be selling and want to give back to the community that made them. Retired clients may already be giving but not necessarily in a way that maximises charitable impact. Or they may be planning their legacy."

Professional advisors don't themselves need to be experts in philanthropy, as that's where the Community Foundation comes in. It offers its philanthropic expertise and resources for free to professional advisors, in turn ensuring their clients can achieve their charitable aims.

"Society faces big challenges, and it can be hard for a potential donor to know where to start," Lisa explains. "The Community Foundation can help professional advisors and their clients understand where the most pressing needs are, and how their giving could make the most difference. By working together, we can inspire and grow effective philanthropy that makes our corner of the world a better place for everyone."

Top Left:
Sarah Robinson, CEO at Full Circle Food Project.

Left:
Curious Arts led arts sessions for young people.

Right:
Staff from fundholder Opencast Software, visiting a grant recipient, Full Circle Food Project.

Alison Hall is Partner and Head of the Private Client department at law firm Hay & Kilner. "We speak to clients about giving with confidence because we know the insight the Community Foundation provides is based on an in-depth understanding of the area," Alison says. "This local knowledge helps us make conversations about philanthropy personal and informed. For clients it helps bring giving to life and shows how they can make a significant difference to communities or causes that are important to them."

Anne and David Parker were motivated to set up their own fund following a conversation with their solicitor. "They were able to explain about how we could start a fund through the Community Foundation that supported our interests," say the couple. "They helped set up this relationship which led to the fund being established in April 2021. Having this referral made the whole process a lot simpler than we could have imagined."

Over the coming decades there will be the biggest transfer of wealth ever seen from the 'baby boomer' generation to the next. And, with rising living costs and widening gaps between the wealthiest and those living in poverty, the Community Foundation knows it will be essential to do even more to harness the powerful force for good that is philanthropy. With donors giving on average 17 times more when supported by a professional advisor, the Foundation's work with lawyers, accountants and wealth managers will be more important than ever.

"Society faces big challenges, and it can be hard for a potential donor to know where to start"





Tackling climate change and poverty together

Following the UN Climate Change Conference (COP 26) in November 2021, the UK Government committed to reach net-zero goals by 2050. As we are all asked to take collective responsibility for combatting climate change, philanthropy has a significant role to play. But, in places like North East England, that has to work hand in hand with efforts to address poverty.

In developing its own response, the Community Foundation draws on learning from previous environmental grants, including from its Local Environmental Action Fund (LEAF), set up as a collaboration with the Shears and Greggs foundations. "We are keen to build on what we've done already," explains Pete Barrett, Senior Programme Advisor at the Foundation. "But we know we need to grow our engagement with donors and partners to identify where we can have the greatest impact." One route is the work of the North East England Climate Coalition (NEECCo), set up by VONNE (Voluntary Organisations' Network North East). It has the ambitious goal of making the North East England's greenest region. Back in 2019, the Community Foundation was the Coalition's first funder. "Without that first grant, we would not have been able to develop our work," says Carol Botten, VONNE's CEO. "The investment initiated other funding and support, helped the development work and assisted partners." Spin-offs include VONNE's 'Going Green Network' which helps local charities and community organisations share ideas and good practice. Involvement with the Network is

helping the Foundation better understand where organisations are in their climate impact reduction journey, and where support is needed. Further intelligence comes from the Foundation's recent anonymous survey of grant applicants, which included a question on how organisations were working to reduce their carbon footprint.

For the Community Foundation, there is a clear emerging lesson: climate and poverty are inextricably linked, and failure to tackle one means failing with the other. "Lower income households are more vulnerable to extreme events, and they have fewer resources to cope and recover," Pete Barrett adds. "The consequences of climate change are skewed to particularly affect the young and the old, those from marginalised communities and those with disabilities. The Foundation recognises we have a big part to play by ensuring philanthropy helps mitigate these disparities."

The Cedarwood Trust in North Tyneside is one local charity that is working to reduce its carbon footprint. "During the Covid 19 pandemic, we provided over 65,000 ready meals to residents," says Cedarwood's CEO, Wayne Dobson. "However, we recognised the environmental impact and wanted to reduce it, but at a time when demand is rising." The Community Foundation worked with Cedarwood to identify a solution that would be both sustainable and impactful. "We received a three-year grant from the Community Foundation's Guy Readman Endowment Fund to lease an electric vehicle," Wayne explains. "We also added to our Nourish Store, a low-cost membership pantry, to supplement the food available with a range of fresh fruit and vegetables."

Far Left: Cap-a-Pie's performance of 'Climate Change Catastrophe!'

Left: Members of West End Women and Girls Centre taking part in their 'Edible Elswick' project.

Right: Food being prepared (bottom right) and enjoyed (top right) at the Cedarwood Trust.

The Community Foundation also acts as a trusted partner to national and international funders. This has resulted in organisations getting further backing for environmental work. Cedarwood Trust is among them, receiving support from The Kavli Trust in Norway. Rune Mørland, Kavli Trust's Head of Strategy and Development says: "The Community Foundation is a valuable partner in helping to identify good organisations and projects, as well as understanding the local context and challenges. Cedarwood Trust and the project Nourish Meals delivers not only on our strategy in reducing food waste, but also doing it in a 'green' and energy efficient way. As Cedarwood Trust also focus on the mental wellbeing for children and young people, they matched perfectly with our mission."

But addressing climate change goes beyond grant-making for the Community Foundation. A critical step taken in 2022 has been adopting a new investment policy which seeks to address environmental, social, and governance (ESG) issues alongside financial returns. The new policy includes a commitment to the Foundation's investment portfolio being net zero by 2050 at the latest, but with a wish to see credible early progress through at least a 45% emissions reduction by 2030. The Foundation is also now a signatory to the Funder Commitment on Climate Change, recognising that all trusts and foundations, whatever their charitable mission and field, have a part to play in addressing the causes of climate change and supporting adaptation to its effects.



The consequences of climate change are skewed to particularly affect the young, the old, those from marginalised communities and those with disabilities

Finding the perfect funding match

With over 300 funds, the Community Foundation is uniquely positioned to marry up the interests of a donor with a diverse range of grant requests. So, it could be called a match-maker: connecting grant applications to the most appropriate funds, ensuring the best outcome for local charities and donors alike.

“Because of the way we work, the Community Foundation can streamline funding for grant applicants,” says Jo Cundall, Senior Advisor, Culture. “A general application to us effectively puts potentially fundable organisations and activities in front of all our donor funds. The Foundation’s staff team then works together to try and get each eligible and strong application as close to being fully funded as possible.” With competition for funding, there are always applications the Foundation cannot support, but it aims to match as many as possible.

The Newcastle Culture Investment Fund awards grants totalling
£600,000
a year

The Community Foundation thrives on collaboration, with each staff member bringing specialist knowledge and experience of donors and applicants. Organisations do not have to bend their work to fit what the Foundation or its donors want. It is the staff team’s job to make the case to donors.

While general applications are always encouraged, the Community Foundation does have some funds which are looking to target a particular issue or area, or which have a specific deadline. In these cases, there is a call out for applications. Around a third of the Foundation’s successful applications arrive this way.

But the two approaches don’t work in isolation. One of the strengths of the Foundation is the flow between them. Staff use their judgement, knowledge and advocacy skills to reallocate applications among different funds. This means that many applications get a ‘second bite at the cherry’. So more get funding and less of applicants’ valuable time is spent on writing multiple bids.

In June 2022, organisations were invited to submit applications to the Arts Council’s Let’s Create Platinum Jubilee Fund. Due to the high number of applications, it wasn’t possible to fund them all. Of 86, the Community Foundation could support 18 directly from the Jubilee Fund. But a further 16 were then picked up by other funds.

Newcastle’s West End Women and Girls Centre successfully secured £9,982 towards converting its large hall into a professional theatre space. This enables the organisation to put on shows that respond to community needs while also raising their own production standards. Having originally applied to the Let’s Create Jubilee Fund, the request was supported after staff reallocated it to the Newcastle Culture Investment Fund.

A general application to us effectively puts potentially fundable organisations and activities in front of all our donor funds

“We were absolutely delighted to hear that, despite being unsuccessful with the fund we originally applied for, the Community Foundation found us alternative funding” said Jill Heslop, the Development Worker at West End Women and Girls Centre. “Accessing Newcastle Cultural Investment Fund for the first time supported us to not only deliver the events we planned, but to think long-term and strategically about the role of the arts in our organisation into the future. As always, the Community Foundation do their best to match our funding needs to relevant funds, whether this is the original funders or elsewhere in the organisation. This support is invaluable.”

The Newcastle Culture Investment Fund awards grants totalling £600,000 a year as a partnership between the Foundation and the City Council to support organisations that deliver cultural projects and enable residents to engage in creativity. The Fund panel were happy to offer full funding to West End Women and Girls without the organisation having to rewrite their application because it was clear it fitted their criteria closely.

With local charities and community organisations under pressure to secure more funding for their vital work, the Community Foundation’s ability to match-make diverse funds and applications is more critical than ever.

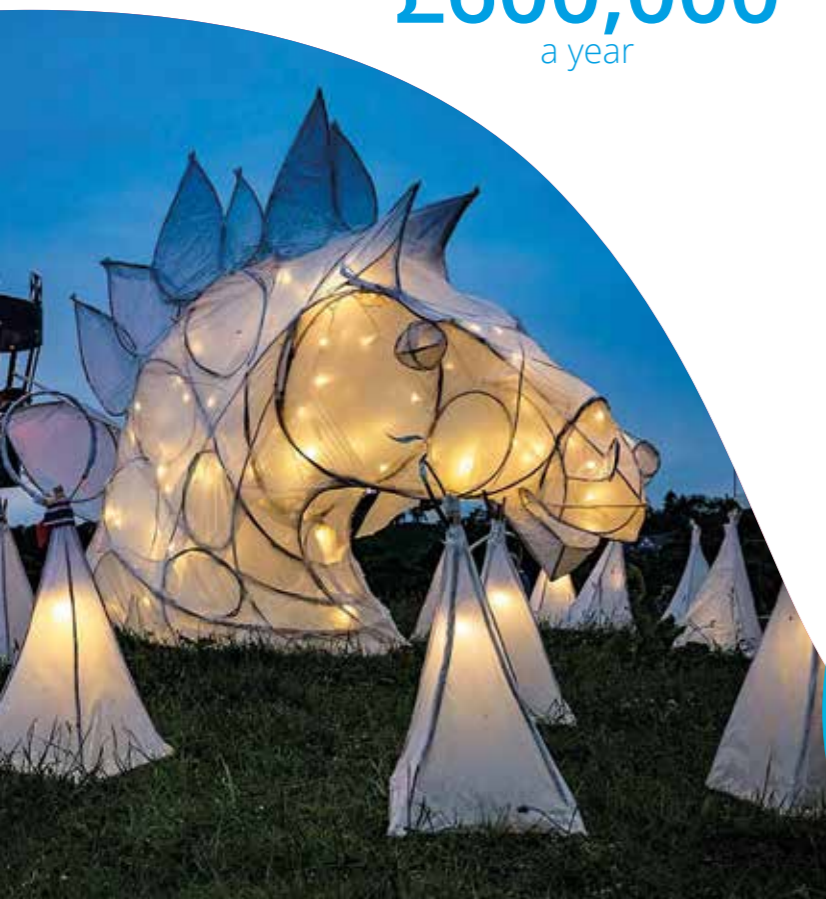
The Arts Council’s Let’s Create Platinum Jubilee Fund received:

86
applications

18
supported

plus
16
supported from other funds

Images:
(Left) Lanterns organised by Green Croft Arts and beacon lighting organised by Urban Gree (Right), both funded by the Art Council’s Let’s Create Platinum Jubilee Fund.



Sharing expertise across sectors

2022 marks three years since the Community Foundation created a dedicated role to oversee its growing non-financial 'sector support' offer of training and pro bono assistance. Over the year, the Foundation has brokered free help to local charities and community organisations around a wide range of topics thanks to time and expertise given by individuals and businesses.

Working with local organisations to identify their needs, the Community Foundation uses its networks and partner relationships to encourage experts to share expertise through 'Skills Match'. The scheme allows businesses and individuals to give to the community with complete flexibility in how their support is offered. The Foundation then curates a programme of webinars, face-to-face training and one-to-one support alongside practical resources, including access to meeting space for board meetings.

Colette Harrison, Development Officer, Sector Support at the Community Foundation, outlines the importance of this approach. "Charities are so busy delivering their services that devoting time and resources for how to develop a digital strategy or address the climate emergency can feel like a luxury," she explains. "This is where we can provide valuable extra help, by bringing experts to charities to address vital themes."

Many of the Community Foundation's partners share their expertise as a guest at a webinar and so reach a wide range of organisations at once. Topics covered have included succession planning for chairs, run with Getting on Board, LGBTQIA+ Representation in Governance, supported by Queer Trustees, Curious Arts, Connected Voice and Volunteer Centre Newcastle, and tackling climate change in partnership with Going Green Together and North East England Climate Coalition. Sessions are recorded and the Foundation has a 'Sector Support playlist' on its YouTube channel. Several organisations have fed back that they watch these films to initiate discussion and inspire fresh thinking in board meetings.

The Community Foundation also matches charities with pro bono support in response to direct requests. David Beuzeval of ION Consulting offers one hour of pro bono time to organisations, including supporting the People's Kitchen. "I am very grateful for the opportunity to help them and looking forward to supporting them to review their strategy and recruit new trustees," David says. Other business members of Skills Match, including designers Sail Creative and lawyers Muckle LLP, welcome ad hoc requests from charities.

A new relationship with web development agency Blueocto is helping charities feel more confident to discuss their digital needs with tech professionals

A key focus this year has been developing charities' digital expertise. The Community Foundation has worked for some time with professional services company Accenture to provide intensive support via its Digital Apprenticeship programme. But sometimes organisations aren't sure what they need. A new relationship with web development agency Blueocto is helping charities feel more confident to discuss their digital needs with tech professionals. "Sometimes you don't know what you don't know, and Blueocto helps charities explore options before diving into a project," adds Colette.

Props North East was the first organisation to access Blueocto's support. Nicola Mansfield-Jones, its Chief Executive explains. "The Community Foundation introducing us to Blueocto was so helpful for our charity at a time that we needed some direction on what would be helpful for our website and social media channels. Caroline Hogan at Blueocto said we can go back to her with any queries or for advice whenever we need to which is lovely. Well worth the time spent."

The Community Foundation's role in bringing charities together with generosity of time and expertise relies on strong networks and a collaborative ethos. As Colette Harrison says, "It is a privilege to be the matchmaker and build connections between charities and businesses, and so help build thriving communities and organisations."

Left:
Curious Arts led arts sessions for young people.

Above:
The High Sheriff of Tyne & Wear, Farooq Hakim, giving Neetzotz the Top Award at the 2021/22 awards ceremony.

Right:
A young person juggling as part of their BTEC performance at Dance City.



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.

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.

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.

Named Vital Funds set up by individuals and families

Anonymous L Fund	Mitford Fund for Northumberland Fund
Crosshatch Fund	Sutherland Fund
Crozier Fund	Templeton Fund
Esmée Slattery Fund	Tony Follows Legacy Fund
Ian and Jane Gregg Fund	

Named Vital Funds set up by businesses

Tolent Fund	Tyne Tees Television Fund
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Named Vital Funds set up by charities/trusts

Greggs Fund	Sir James Knott Trust Fund
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Collective Funds

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

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.

Below: The Ringtons Fund at the Community Foundation celebrating a grant made to the Wheels Project.



...donors use funds to support a particular place or cause...

Funds set up by individuals and families

Anne & David Parker Fund	Lady Betty Martin Fund within the North East Fund for the Arts
Brian & Margaret Thompson Fund	Langley Family Fund
Burnell Family Funds (including Community First)	Linden Family Funds (including Community First)
Carrie Reay Grassroots Fund	Nash Fund
Christopher Beadle Fund	Pamela Denham Grassroots Fund
Daisy Marr Fund	Prime Fund
Express Enterprise Fund	Rod & Rosemary Taylor Family Fund NEW
Fausta and Rosemary Community First Fund	Sandra King Rainy Day Fund
FB & PFB Lough Fund	Spriggs Family Fund (including Community First)
George and Peggy Fund	The HunterPemberton Community First Fund
George Loggie Fund	The Lawrence Campbell Community First Fund
Grigor McClelland Funds (including Community First)	The Muriel Campbell Fund
Hillside Fund	The P Z Fund
Ivy and Gilbert Purvis Fund	The Temple Fund NEW
JesDesStaff Fund	Tyne & Wear Grassroots Fund
Josephs Family Fund	Winter Family Fund
June King Fund	
Kellett Fund	

Funds set up by businesses

Akzo Nobel International Paint Fund (includes Community First)	North East Brewers Fund
Canford Audio Fund	Northumberland Group Fund
Enviresearch Fund	Port of Tyne Community Action Fund
John Laing Fund	Rolls-Royce Fund
JPMorgan 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
Chapman Fund	North Tyneside Fund
Coquet Fund	Roland Cookson Community Fund
Dickon Trust Fund	Rose Joicey Fund
John Bell Fund	Roseline Foundation Fund NEW
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	Matthew Ridley Fund
Adderstone Fund	Maudslay Family Fund
Adrian and Ingrid Gifford Fund	McIntosh Fund
AJM Fund	Michael and Christine Heppell Fund
Alan Morse Grassroots Fund	Milburn Briel Fund
Andrew and Charlotte Dixon Fund	Nancy Barbour Award Fund
Anonymous R Fund	NEF Grassroots Fund
Appletree Fund	North East Endowment for Musical Traditions Fund
Barnes Fund	Out and About Fund
Barry and Faga Speker Fund	Pamela and Dorothy Denham Fund (including Community First)
Bellingham Fund	Patch Fund
Blackett Family Community First Fund	Percy Family Fund
Brian Roycroft Fund including the Tessa Hide Fund	Platten Family Fund (including Community First)
Carolyn and Tony Brookes Fund	Proudfoot Family Fund
Carroll Savage Fund	Readman Family Grassroots (including Community First)
Chrysalis Fund	Readman Foundation Fund
Curtin PARP Fund	Reeds Funds (including Community First)
Daphne & Martin Cookson Fund	Riddell Family Community First Fund
David and Gitta Faulkner Fund	Riding Grange Grassroots Fund
Dream Jar Fund	Robinson Fund NEW
Duncan and Sarah Davidson Fund	Ron and Louise Bowey Funds (including Community First)
Elgon Fund	Sara Alexandra Bernstone Fund
Emma Newton Fund	Shibley Family Fund
Evangelical Fund	Shobha and Triloki Srivastava Funds (including Community First)
Fogo Funds (including Community First)	Sir Tom Cowie Fund
Geoffrey and Ann Purves Fund	Smail Family Fund
Groves Family Fund	Sowler Family UK Charitable Fund
Guy Readman Endowment Fund	Speke Family Fund
Henderson Family Fund	Star Fund
Heyman Travelling Scholarships Fund	Stephen Byers Fund
Hoult Family Funds (including Community First)	Storey Family Grassroots Fund
I'Anson Family Fund	Sue Wilson Fund
If Only... Fund	Suz Grassroots Fund
Jackie Haq Fund	Ted Weekes Fund
John & Barbara Sadler and Jeanette Henderson Fund	Tess Fund
John D Endowment Fund	The Hokey Cokey (that's what it's all about) Fund (including Community First)
Johnnie & Tricia Smith and Family Fund	The Edwin John Easydorchik Travelling Scholarship Fund
Kerry Funds (including Community First)	The Louise Dalton Fund
Leech Challenge Fund	
Lendrum Family Community First Fund	
Margaret and Dorothy Gordon Memorial Fund	
Mark and Ian Wilson Family Fund	

Funds set up by individuals and families

The Lucy Winkell Fund	Watkin Family Fund
The Pea Green Boat Community First Fund	Weightman Fund
Thornton Family Grassroots Fund	Welch Family Fund
Three Valleys' Fund	Wide Open Road Fund
Treeline Fund	William Leech Charity Fund
Vicky F Grassroots Fund	Willis Charitable Fund

Funds set up by businesses

Bellway Fund	PricewaterhouseCoopers Fund
EDF RE Blyth Offshore Demonstrator Wind Farm Community Benefit Fund	Ray WindFarm CIC Small Grants Programme Fund NEW
EDF RE Green Rigg Wind Farm Community Benefit Fund	Ringtons Funds (including Community First)
EDF RE Barmoor Windfarm Community Benefit Fund	RWE Renewables Kiln Pit Hill Wind Farm Community Fund
Fergusons of Blyth Fund	RWE Renewables Middlemoor Wind Farm Community Fund
Muckle Fund	Squires Foundation Fund
Naylor's Gavin Black Fund NEW	Thorne & Derrick Fund
Newcastle Building Society Community Fund	Vattenfall Ray Wind Farm Small Grants Programme Fund
Northern Powergrid Fund	Ventient Sisters and North Steads Wind Farm Community Benefit Fund
Northumbrian Water Fund	Virgin Money Endowment Fund
Opencast Charitable Fund	Ward Hadaway Fund
P&G Fund	Wood Fund
Pattinson Estate Agents Fund	

Funds set up by charities and trusts

Barley Hill Fund	G S May Family Fund
Berwick Academy Endowment Fund	Latterford Fund
Bill & May Hodgson Fund NEW	Northumberland Village Homes Trust Fund
Capt. C.D. Leyland Fund	Robert Wood Trust Fund
Charles Robert Bell Fund	Sunderland Industrial & Reformatory School Fund
CrecheMobile Fund	The 1989 Willan Charitable Trust Fund
Culture Bridge Fund	The George Cringle Scholarship Fund
David Dockray's West End Young People's Fund	The Pargiter Trust Fund
FARNE Fund	Wellesley Trust Funds (including Community First)
Frederick Milburn Fund	

Left:
InHarmony performance with North Music Trust.

Below Top:
The Hen Power project ran by Equal Arts has proved to be hugely popular and has been replicated nationally. It was originally funded by the Community Foundation.

Below:
Artist in residence at the D6 Studio, Dimitris Chimonas. Funded by the Newcastle Cultural Investment 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 Fund	Moor Fund
Frank Acfield Fund	St Cuthbert's Fund
Jane Robertson Alnwick Fund	Stuart Ayre Fund
Jeremy Beecham Schools Fund	Taylor Fund

Funds set up by businesses

Bonas Machine Company Fund

Funds set up by charities and trusts

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

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

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.

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

#iwill Fund – in partnership with the National Lottery, Department for Digital, Culture, Media & Sport and UK Community Foundations	NET Coronavirus Appeal Fund – in partnership with National Emergencies Trust and UK Community Foundations
Arts Council England Let's Create Jubilee Fund	North East Social Investment Fund - in partnership with Big Society Capital, Esmee 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	The Community Infrastructure Levy (CIL) Fund in partnership with Gateshead Council
Newcastle Culture Investment Fund - in partnership with Newcastle Council	Third Sector Trends Study
	Vital Signs
	We also provide expertise and advice to the Bernicia Foundation, Ridley Family Charity and Shears Foundation.

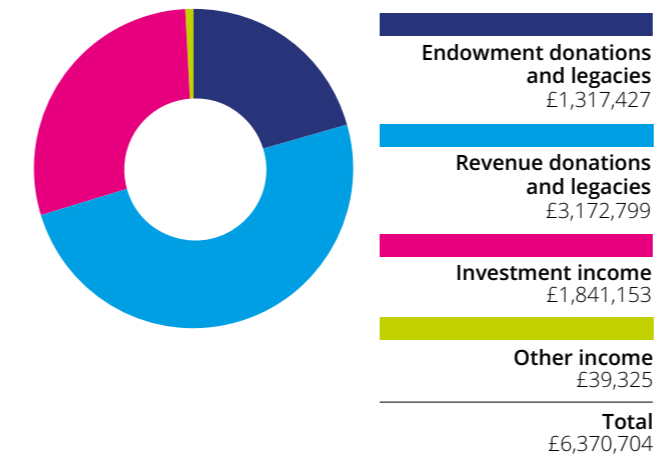
Below:
'Contested Desires' walking refugees project near Vindolanda on Hadrian's Wall.



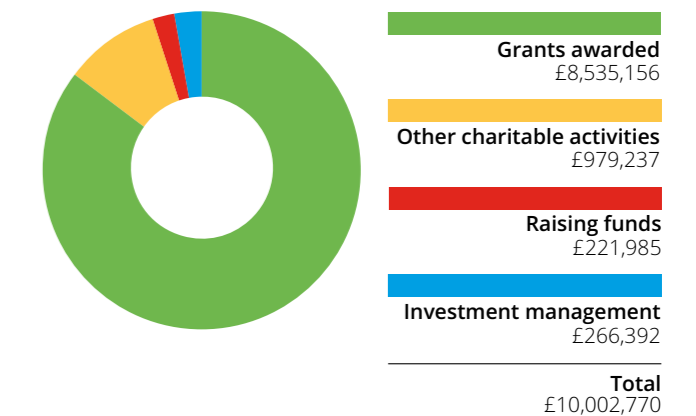
Summary of our finances for 2021-22

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

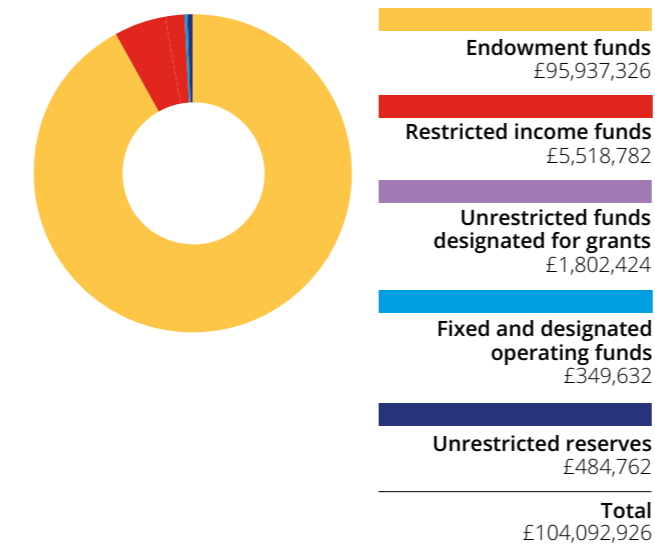
Our income



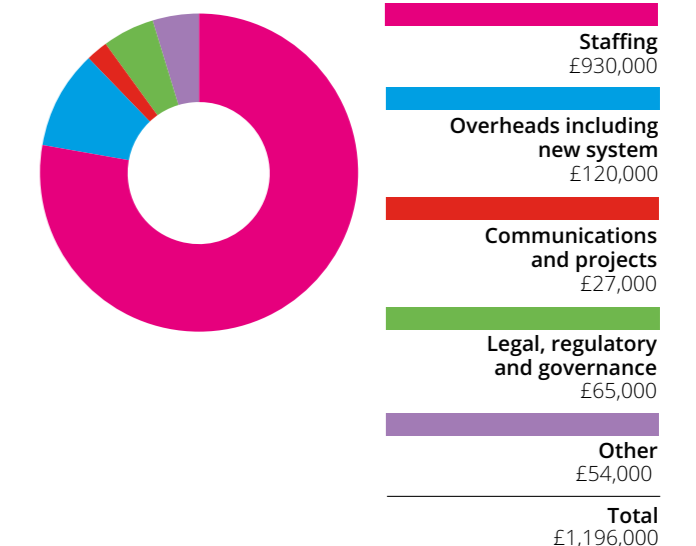
Our expenditure



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 set by our Board of trustees. Including new gifts, the overall endowment value rose from £93.4m at March 2021 to £95.9m at March 2022. The Board was satisfied with investment performance which was ahead of benchmarks we set. The unrestricted operating reserves at the year end, after the Board designated funds to support running costs over two years, was within the range set out in

our policy. At the end of the year, the Board adopted a new investment policy which sets out responsible as well as financial goals. Appointment of managers, and their mandates, will be reviewed during 2022-23 in line with the new policy.

The full financial statements for the year ending 31 March 2022 were approved by our Board on 21 September 2022. Copies of these, and our investment policy, are available on our website www.communityfoundation.org.uk or by contacting our office.

Our grant facts and figures

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

Overview

1,333 grants totalling **£8,574,010** made

624 organisations and 113 individuals supported

£6,432 average grant

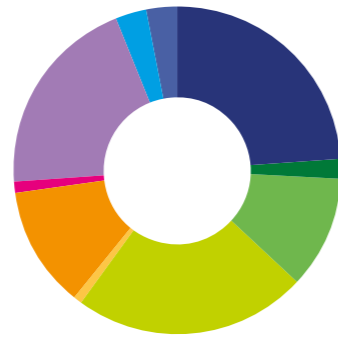
55% of the total (£4.75m) was core funding for organisations

50% of the total (£4.3m) was to continue work we'd previously supported

129 grants went to organisations new to us

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

Causes supported



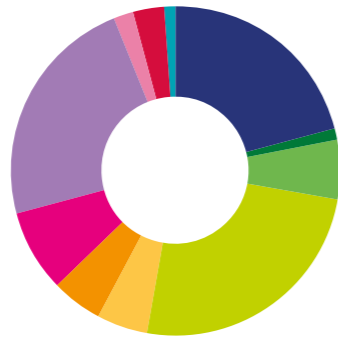
24%	Arts, culture & heritage £2,057,424	2%	Environment £149,955
11%	Fairness & inequality £973,049	23%	Healthy living £1,962,096
1%	Housing and homelessness £103,400	12%	Learning £1,040,576
1%	Local economy £42,491	20%	Strong communities £1,739,798
3%	Safety £221,630	3%	Work £283,591

Amounts awarded



3%	Up to £1,000 £275,932	21%	£1,000 - £5,000 £1,836,927
26%	£5,000 - £10,000 £2,235,040	15%	£10,000 - £20,000 £1,273,392
18%	£20,000 - £30,000 £1,502,401	3%	£30,000 - £40,000 £265,878
2%	£40,000 - £50,000 £193,679	3%	£50,000 - £100,000 £253,976
9%	Over £100,000 £736,784		

Places reached



21%	NE England-wide £1,784,130	1%	Tyne & Wear-wide £50,884
6%	Gateshead £510,689	25%	Newcastle upon Tyne £2,138,115
5%	North Tyneside £436,021	5%	South Tyneside £456,270
8%	Sunderland £724,099	23%	Northumberland £2,004,455
2%	County Durham £189,191	3%	Tees Valley £226,406
1%	Outside NE England £53,750		

People helped

Most of our grants – 410 totaling £3.2m (37% 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	278	16%	16%
	- Aged 12-17	423	25%	22%
	- Aged 18-24	410	24%	21%
Older people	£1.4m	166	10%	14%
Disabled people	£1.3m	185	11%	14%
Black, Asian and minority ethnic communities	£0.3m	57	3%	3%
Asylum seekers/refugees	£0.3m	54	3%	3%
Women	£0.6m	119	7%	6%
Lesbian, gay and bisexual	£0.06m	10	<1%	<1%
Transgender	£0.04m	7	<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.

Left: Motorcycle maintenance training ran by The Wheels Project in Hebburn.
Right: Drawing together at Bellingham Middle School in Northumberland.



Grants totalling **£8,574,010** were made in 2021-22

Our people

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 MBE
Hugh Welch
Sue Winfield CVO OBE CSTj
Gill Winter
Mike Worthington OBE

PATRONS

Dame Margaret Barbour DBE DL
Ron and Louise Bowey
Professor 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

Our trustees



Phil Moorhouse
Chair:
Non-executive director and business investor



Lucy Winskell
Deputy Chair:
Lord Lieutenant of Tyne & Wear



Paul Farquhar
Treasurer:
Company director and accountant



Jill Baker
Director of Development, Lloyds Bank Foundation



Michael Brodie
Chief Executive, NHS Business Services Authority



Sarah Glendinning
Regional director, CBI



Andrew Haigh
Chief Executive, Newcastle Building Society



Colin Hewitt
Senior Partner, Ward Hadaway



Claire Malcolm
Chief Executive, New Writing North



Patrick Melia
Chief Executive, Sunderland City Council



Fiona Standfield
Chief Operating Officer, Diocese of Newcastle and Hexham



Laura Warwick
Senior lecturer and consultant in service design

Our staff

SENIOR EXECUTIVE GROUP

Rob Williamson
Chief Executive
Sonia Waugh
Chief Finance and Operating Officer and deputy CEO
John Hollingsworth
Chief Philanthropy Officer and deputy CEO
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
Hamish Carter
Grant Programme Advisor
Colette Harrison
Development Officer, Sector Support
Ali Walker
External Relations Officer
Ged Robinson
Funding Co-ordinator

OPERATIONAL SUPPORT

Mike Whitfield
Head of Operations
Dawn Porter
Executive Support Officer
Sarah Phillipson
Finance Co-ordinator
Adam Smith
ICT and Facilities Co-ordinator
Emma Holmes
Grant Process Co-ordinator
Jacqueline Turner
Office Administrator



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

Left: Community Foundation staff team.

Diversity

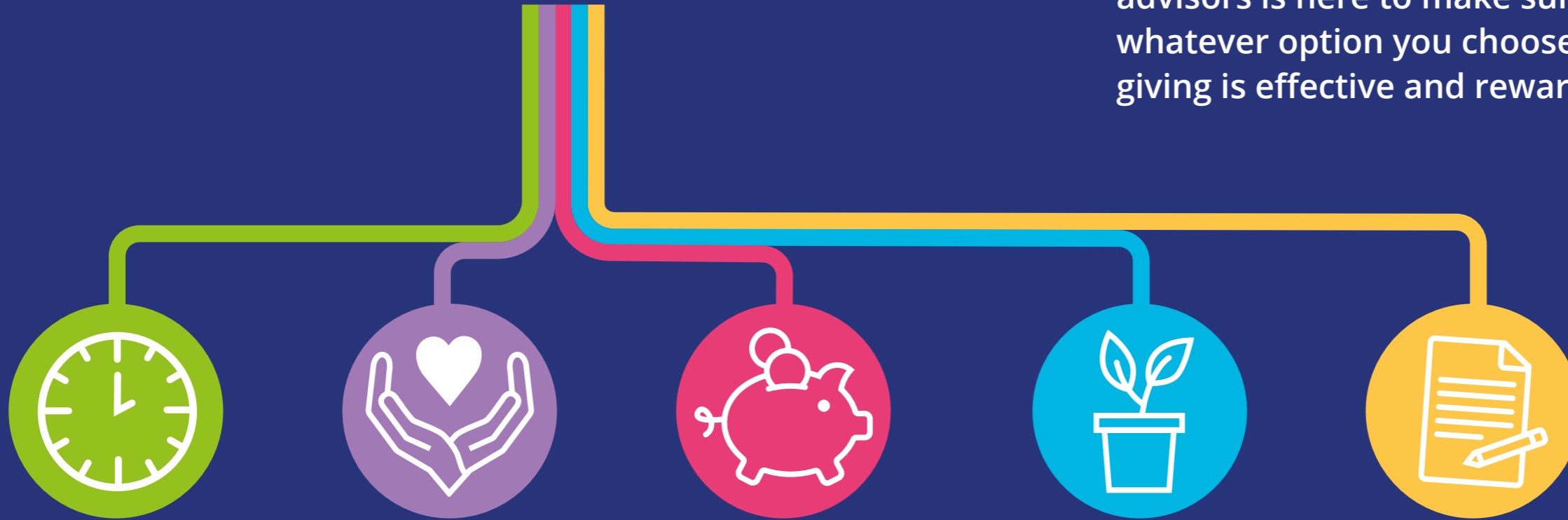
In March 2022 the Community Foundation board agreed and published benchmarks for the diversity of our staff and trustees against which we will measure how well we reflect our communities. Where possible the benchmarks reflect demographics in North East England.

You can read more about our approach to benchmarking on the Diversity, Equity and Inclusion page on our website.

www.communityfoundation.org.uk

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 more about collective giving on p6-7

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.

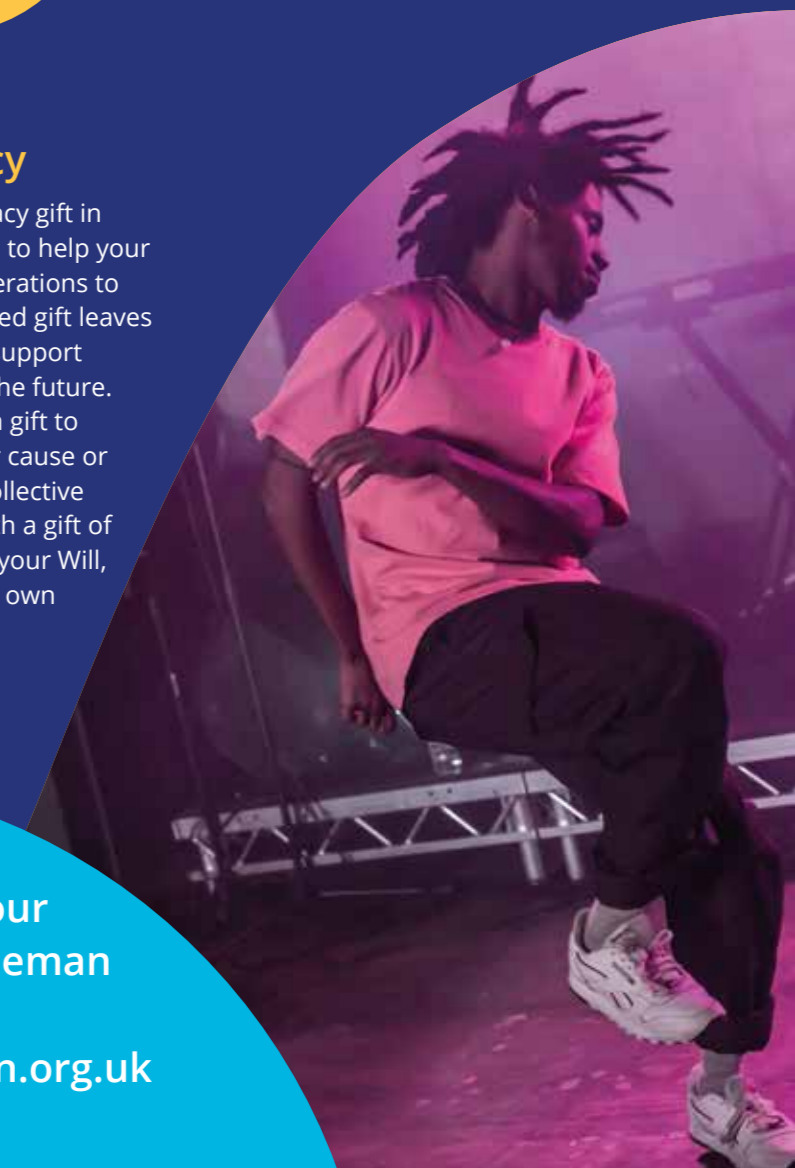
Start your own fund

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.

Left: Members of Silx Teen Bar Youth Project on a litter pick in Blyth.
Below: A dancer taking part in creative workshops organised by Northern Roots.



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

Advisors

Auditors: Azets

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 2021/22. All other information has been updated to the time of going to press in October 2022.

Design and artwork: Lisa Kirkbride

Photography: Gilbert Johnston Photography, Northern Shape, Green Croft Arts, Equal Arts, Curious Arts, Opencast Software, Cap-a-Pie, Simeone J Rudolphi, West End Women and Girls Centre, Cedarwood Trust, Urban Green, Dance City, Bellingham Middle School, Ben Hughes, Saya Rose Media, C Modina, Northern Roots.

Cover image: A performance of 'The Queens Knickers' based on the book by Nicholas Allen. A project run by Northern Shape.

Community Foundation serving Tyne & Wear and Northumberland

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Limited Company No. 2273708
Details of the Community Foundation's
Privacy Policy can be found on our website.

