



# Backing the **brilliant work** of local charities





# Welcome from the Chair and CEO

The Community Foundation’s vision is to see communities thrive across North East England, with fairness and generosity changing lives and helping everyone feel they belong.

We have some acute challenges in our region, including poverty, poor health and barriers to opportunity. At the Community Foundation, we see the growing demand on charities, schools and other institutions to meet more of people’s basic needs. Although inflation is down, prices haven’t stopped rising – they’re just going up more slowly – with the pressure worst on essentials like food and energy.

We are encouraged to see a strong commitment from the new North East Mayor and Combined Authority to address poverty and related issues, and we welcome the complementary messages coming from regional media and business. We won’t solve our challenges just by what we do in the region: national policy and investment will be critical. But we believe philanthropy in the North East can have a greater impact alongside the public sector and private investment.

Since being established in 1988, we have awarded nearly £175 million in grants to thousands of small, local charities and community organisations. And we remain the largest community foundation by asset size of 47 in the UK. These are things about which our region can be very proud. None of it would be possible without the huge generosity of people, businesses and other bodies who set up or contribute to our funds. But growing that giving cake

remains central to our mission. We must build more local philanthropy, including by continuing to add to our endowment, which is a vital community asset here to serve our area now and for generations to come.

And we need to make sure the giving of money, time and expertise is making the most difference. The Community Foundation has a key role – inspiring and guiding new and existing donors and working with other funders. We’ve also begun looking at what our goals and priorities should be for the next several years. Our Vital Signs reports published this year provide a starting point for that conversation in which we hope you will all take part.



*Phil Moorhouse*

Phil Moorhouse, Chair



*Rob Williamson*

Rob Williamson, OBE DL, CEO

“

“Since we were established in 1988, we have awarded nearly **£175 million** in grants...”



## Highlights of the year



Our **North East Roots** Showcase celebrating the region’s generosity featured performances from North East talents Kay Greyson and Katie Grace Rushworth, and saw an announcement of a £250,000 pledge from the Reece Family.



Our first ever **participatory grant-making programme** – Mackem Money – saw 40 local charities and community organisations in Sunderland share funding of £137,000.



We published **Vital Signs 2024** covering ten themes and highlighting ways philanthropy can make the most difference to our region’s people and places, with events held in March and June in partnership with Newcastle Building Society.



We funded an artistic commission to celebrate the legacy of the felled **Sycamore Gap** tree through the Northumberland National Park Authority.



We received the first ever **triple-A rating** in the independent Foundation Practice Rating which assesses UK grant-making charities around transparency, accountability and diversity.



Our Chief Executive, **Rob Williamson**, was awarded an OBE for voluntary and charitable services in the 2024 New Year’s Honours.

Thanks to the people and businesses who supported the Community Foundation this year by partnering in our events and activities and giving their expertise to us pro bono.

- |  |                            |
|--|----------------------------|
| Accenture  | Muckle LLP                 |
| Association of Chairs                            | One Strawberry Lane        |
| Blue Octo  | Raymond James Monument     |
| Lucia and Mark Bridgeman                         | RBC Brewin Dolphin         |
| Charity People                                   | Alan Ross                  |
| Evelyn Partners                                  | Unite Group                |
| Future Fixers                                    | Volunteer Centre Newcastle |
| Lycetts Insurance Brokers and Financial Services | Ward Hadaway               |
| Newcastle Building Society                       | Womble Bond Dickinson      |

**Bottom left:**  
A young person enjoying a performance arts and sensory class run by True Colours Theatre.

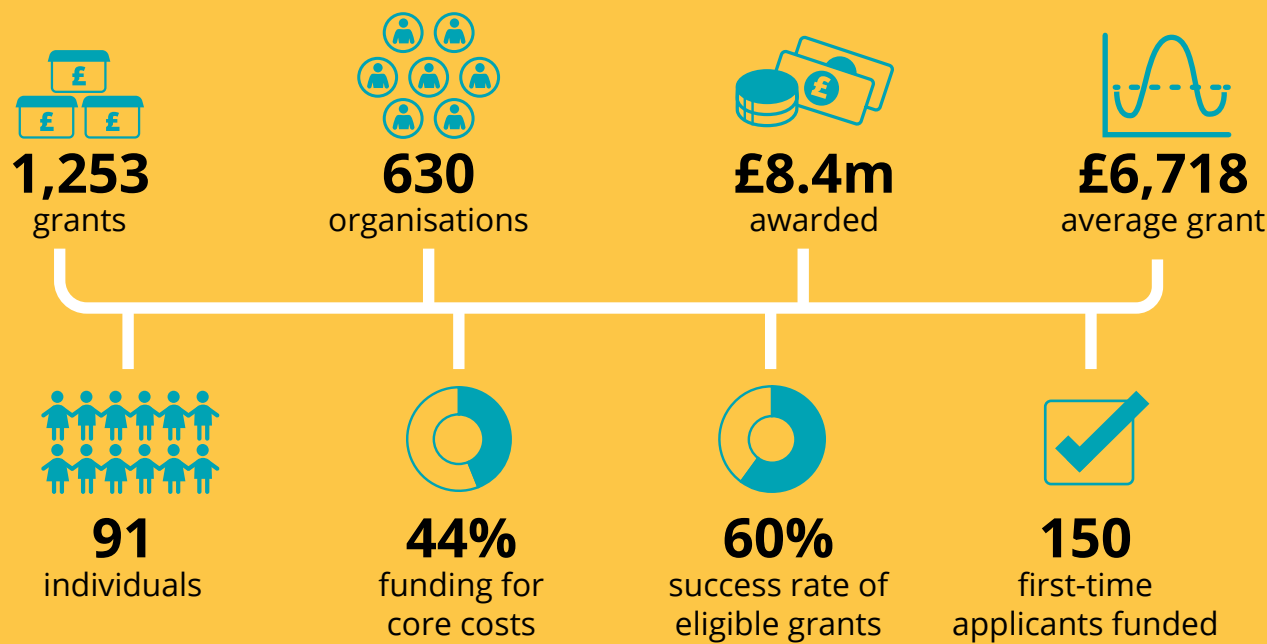
**Bottom centre:**  
Alan Hull Bursary Award winner 2023, Katie Grace Rushworth, performs at the North East Roots Showcase.

**Top right:**  
The Sycamore Gap tree before it was felled.



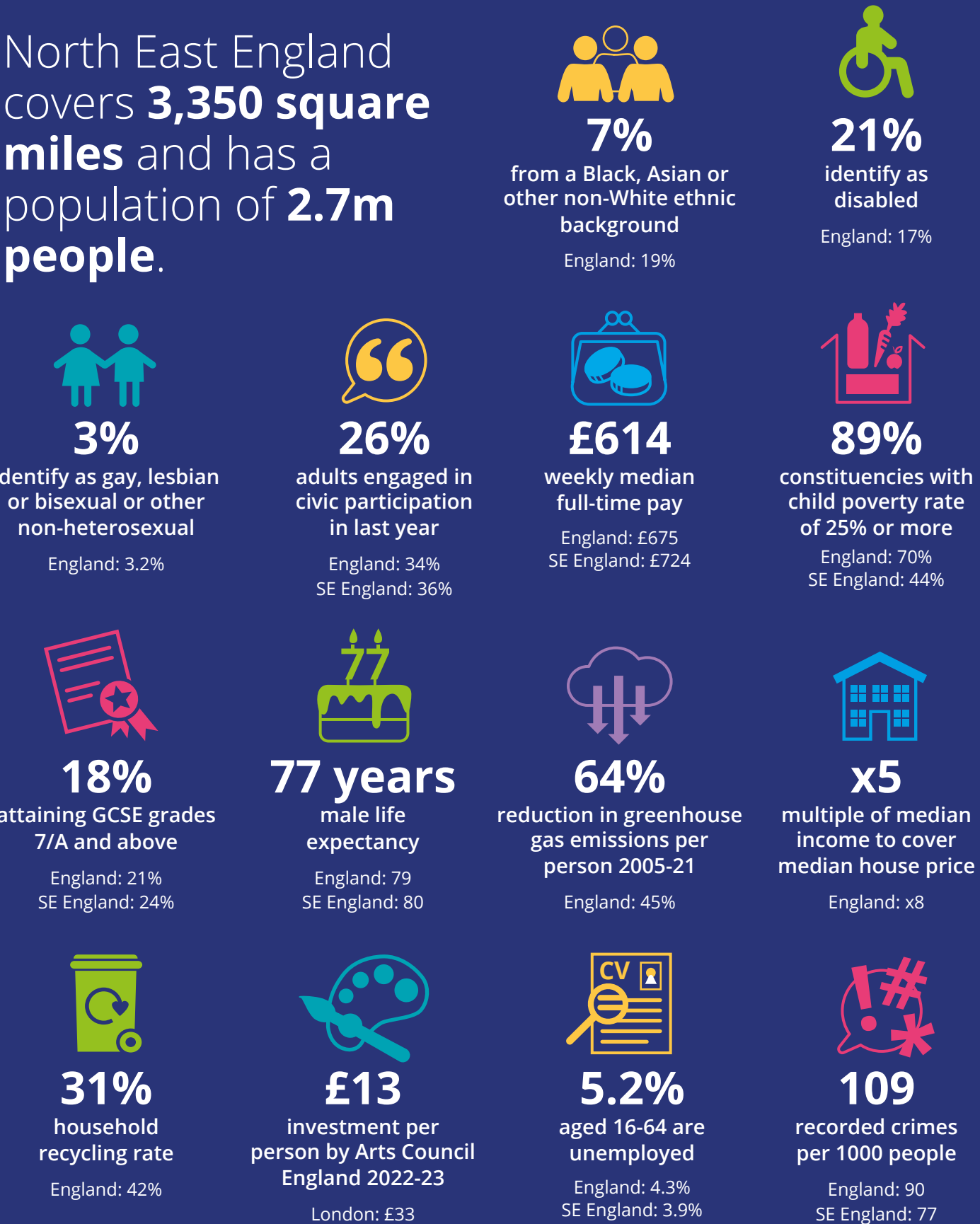
# 2024

## Our facts and figures

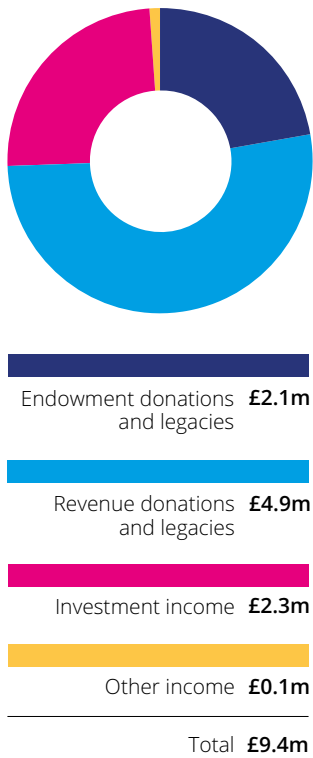


# Our region's Vital Signs

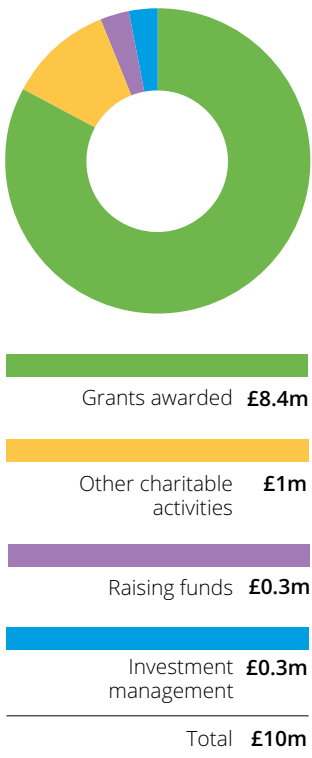
North East England covers **3,350 square miles** and has a population of **2.7m people**.



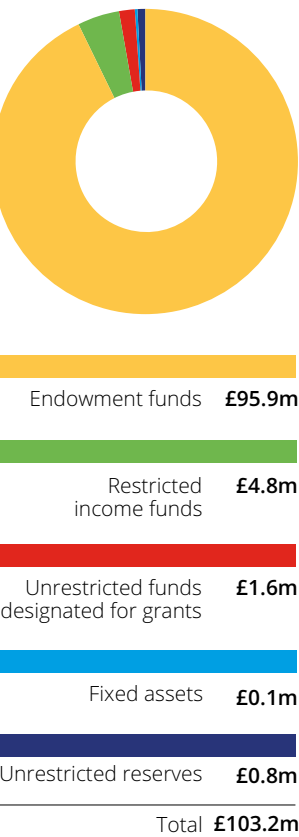
### Our income



### Our expenditure



### Our assets



Our full approved financial statements for the year ending 31 March 2024 are available on our website [www.communityfoundation.org.uk](http://www.communityfoundation.org.uk) or by contacting our office.



# Reaching across communities and causes

The Community Foundation enables generous people and businesses to support communities and causes across our area. Through the funds set up by donors, we back small local charities and community organisations making a lasting difference. In 2023-24 we awarded 1,253 grants to 630 organisations and 91 individuals.



One organisation supported during the year offered professional sewing training to help refugees and asylum seekers to overcome barriers. CREST (Compact for Race Equality in South Tyneside) received a grant from the Watkin Family Fund at the Community Foundation to run 'Learning to Sew Project' workshops. As a result, 16 women were supported to develop skills and produce their own garments. Many who participated had limited access to educational opportunities, due to barriers in reading, writing and conversing in English; however, by the end of the workshops they had increased self-esteem and reduced isolation.

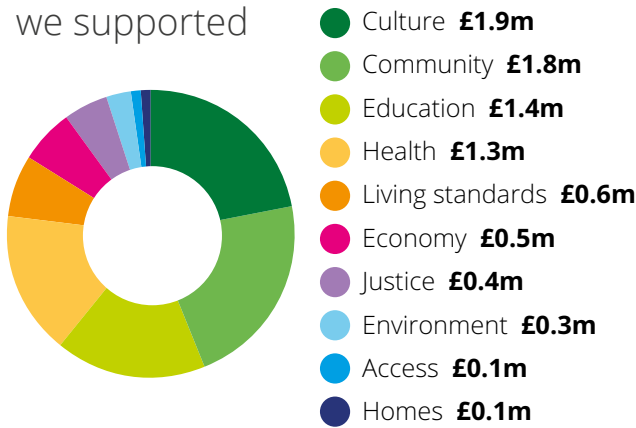
“The impact of the sewing class has been tremendous, providing women from disadvantaged backgrounds, who are affected by several issues that create barriers for them, with a space to be themselves, be comfortable, be confident and courageous in their hopes and dreams. We have been so pleased to see the women learn about each other's cultures and communities and build new friendships that hopefully will be long lasting.”

Mahida Begum, CREST

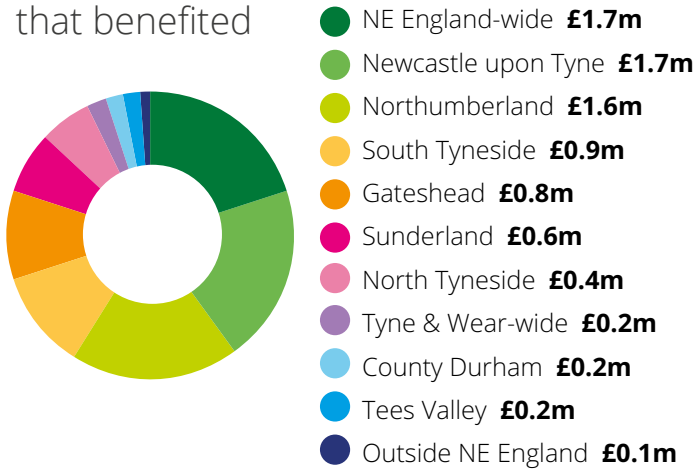
During the year, we targeted funding to support younger or older people, or other demographic groups experiencing **disadvantage or discrimination**, as shown in the table.

£1.3m	Children aged 5-11
£2.3m	Teenagers 12-17
£2.2m	Young people 18-24
£1.9m	Older people
£1.4m	Disabled people
£1.2m	People experiencing poverty
£0.6m	Women
£0.5m	Refugees and asylum seekers
£0.4m	Poorly housed and homeless people
£0.4m	People in isolated rural areas
£0.3m	People from Black, Asian or non-White ethnic backgrounds
£0.1m	Lesbian, gay, bisexual or transgender people

## The causes we supported



## The places that benefited



79%  
of our funding went to organisations in the most deprived half of our post-code areas



# Supporting organisations at the grassroots

At the Community Foundation, our aim is to be a trusted and effective funder of small, local charities and community organisations who are working at the grassroots. Small charities are defined as having income under £1m, but we prioritise those with incomes under £0.5m. We also provide non-financial support to organisations, including through our trustee-and skills-matching services.

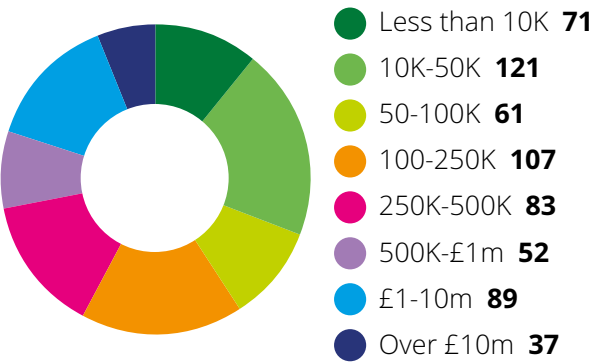


The most recent data from the Community Foundation's Third Sector Trends Study shows that in North East England:

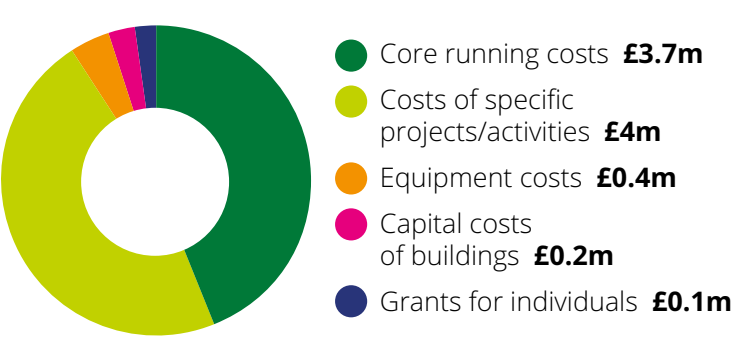
- There are **6,900** charities and community organisations with total income of **£1.5bn**
- They have **37,300** paid staff – **3.1%** of regional employment
- There are over **150,000** regular volunteers contributing c. **11 million** hours of volunteer time worth the equivalent of **£146m** at average regional wages
- 51%** of board chairs and **60%** of chief officers are women; around **6%** of each are from Black, Asian and ethnic minority backgrounds.
- Over **70%** say grants are their most important income

[www.communityfoundation.org.uk/third-sector-trends](http://www.communityfoundation.org.uk/third-sector-trends)

Income by number of grantees



Costs we supported



**£0.5M**

**71%**

of the organisations we supported in 2023-24 were in the under £0.5m priority

**71**

organisations with income under £10,000 received grants

**NEW**

**150**

organisations were new recipients of our funding

**60%**

success rate for external applicants

**81%**

of organisations funded were registered charities

**73**

organisations benefited from our pro bono support including trustee and skills match

In 2024, 40 groups across Sunderland shared £137,000 of funding through 'Mackem Money', the Community Foundation's first participatory grant programme. The Foundation handed over decision-making to a group of local people who chose where the money went. Groups also received support from Voluntary and Community Action Sunderland (VCAS) and the Sunderland Voluntary Sector Alliance.

One of the recipients of a grant was The Sensory Place. Set up by parents of children with disabilities and sensory needs, it offers support groups, sensory-friendly activities, training and facilities for play in a safe, secure and non-judgemental environment.

“The funding has allowed us to provide a range of inclusive dance and art classes for children with special educational needs and disabilities. We have also been able to purchase specialist equipment. This means children who are often excluded from these types of activities can come together to have fun, learn new skills and ultimately be themselves. It also gives their parents and siblings the opportunity to socialise with other like-minded people which in turn helps to reduce the social isolation that often comes hand in hand with raising a disabled child.”

**Helen Abernethy, The Sensory Place**

**Centre left:**  
A young person learning how to code at a computer outreach centre organised by Blyth Harbour Commissioners (Port of Blyth).

**Bottom right:**  
Speakers at the 'Mackem Money' celebration event.



# Growing giving and philanthropy

Key to the Community Foundation's mission is growing more and better philanthropy to benefit our area's people and places. People and businesses from all walks of life trust us to support and guide them in their giving journey. National data shows a stagnation in the value of charitable donations with an increasing reliance on a smaller pool of donors. So, it has never been more important to grow the giving cake to support causes on the doorstep.



12

new funds  
set up in 2023-24



£2.1m

Total donations  
to invested funds



Top 3

ways donors were  
introduced to us:  
1: self-referral  
2: fund-holder introduction  
3: staff contact



£3.6m

Total donations  
to annual funds

The year again saw the Community Foundation receive generous donations from people who had chosen to make a lasting difference to their area through a gift in their Will. Three new funds were set up with legacy gifts.

- **Cynthia Hoare Fund:** to support broad charitable purposes with an interest in music.
- **Marian Winship Fund:** to improve quality of life in North East England with a specific interest in South Tyneside.
- **Brian Lewis:** an unrestricted gift which will support the Foundation's charitable activities.

In 2024, the North East Roots Fund contributed significantly to the Community Foundation's grant for an artistic commission and exhibition which will see the largest section of the Sycamore Gap tree installed at The Sill in Northumberland. The tree was felled in an act of vandalism in 2023 which made worldwide news. The Linden Family, Michael and Christine Heppell and Duncan and Sarah Davidson funds at the Community Foundation also contributed alongside a dedicated gift from Nadara.

[www.communityfoundation.org.uk/northeastroots](http://www.communityfoundation.org.uk/northeastroots)

The Community Foundation's Giving Network celebrated a £100,000 milestone this year with support for four local charities. Friends Action North East, Northumberland Domestic Abuse Service, Oswin Project and Recyke y'bike shared a pot of over £20,000.

Giving Network members commit to donating at least £30 a month which is matched £1 for £1 by the Foundation. Members get a long-list of trusted organisations tackling issues highlighted in the Foundation's Vital Signs reports and select four they'd most like to hear from. Shortlisted organisations present at an annual Giving Event, where members choose how to allocate their share of the funding pot.



"One of our aims at the Community Foundation is to show that anyone can be a philanthropist, and The Giving Network shows you don't need to have millions to make a difference. We want the Network to keep growing and reaching new people who are passionate about supporting their local communities."

**Lisa Cappleman, Community Foundation Head of Giving and Philanthropy**



During the year, members of the Reece Family generously pledged £250,000 to the North East Roots Fund at the Community Foundation which enables anyone with a passion for the region to 'give back' wherever they are in the world. The pledge builds on initial support from the late Guy Readman's legacy, and the Shears Foundation, which meant we were able to match the first £100,000 of gifts made. The new pledge is being used to inspire further donations and take the fund towards an initial target of raising at least £1million.

The Fund supports local charities and community organisations which help create opportunities, reduce inequalities and sustain the region. Recipients to date have included Phoenix Detached Youth Project in North Shields, Skills4Work in Gateshead, Pallion Action Group in Sunderland, and the Tyne Rivers Trust in Corbridge.

The gift from the Reece Family was announced at the Community Foundation's North East Roots Showcase which took place at Baltic Centre for Contemporary Art.



"The idea of the North East Roots Fund really resonated with me and my family. We have strong roots in the North East but we're also not all in the region anymore. The opportunity to give back was compelling. I call on anyone with the means to support the fund and really help the Foundation make a difference to communities".

**Anne Reece**

Left:  
Members at the Giving Network Giving Event 2024.



# Informing philanthropy's response to vital issues

At the Community Foundation, gathering and sharing knowledge is key to how we seek to make the most difference. Our Vital Signs 2024 reports 'take the pulse' of our area's people and places, identifying issues we face and ways people and businesses can get behind a better philanthropic response to their needs.



Our **Vital Signs** reports explore ten themes. We draw on statistics, research, local expertise and knowledge garnered through our funding to inform a better philanthropic response from donors and funders.

**Left:**  
Audience members at 'Vital Signs North East 24'.  
**Right:**  
Community Foundation CEO, Rob Williamson, speaking at 'Vital Signs North East 24'.



[www.communityfoundation.org.uk/vital-signs](http://www.communityfoundation.org.uk/vital-signs)

From our Vital Signs themes, the Community Foundation has identified three calls to action for people and organisations in the North East.

**More recognition of the value of the region's 7,000 charities and community organisations and impetus to invest in them accordingly.**

The sector is a huge North East asset. It employs more than 37,000 people alongside 152,000 volunteers and has a financial value of £1.7bn. But its total social and economic contribution is probably closer to £6bn. It could be doing even more. But it is under threat, and needs long-term, core financing, strong data and infrastructure, and to be resourced for activism, advocacy and campaigning alongside services.

**Join in a renewed effort to grow giving and philanthropy to benefit our people and places.**

There's just not enough giving of money, time and expertise to go round. It's not philanthropy's job to pick up things that government and business can and should do. But philanthropy can do more, and better, if individuals, businesses and employers grow the giving cake.

**Build on the opportunities of devolution.**

A decline in civic participation risks greater disconnection in the NE. Civil society plays an essential role in bringing people together and creating a dynamic regional culture. It also provides spaces where people can connect with local democracy and help shape the decisions that affect them. The Mayor and North East Combined Authority have the chance to harness efforts across sectors to create an environment where civil society and philanthropy can flourish and play their part in ensuring everyone benefits from growing prosperity.

In July 2024, the Community Foundation shared findings from the ten Vital Signs reports at an event attended by around 200 civil society organisations, philanthropists, businesses and public sector leaders. With generous support from Newcastle Building Society, 'Vital Signs North East 24' looked at the challenges facing the North East and the opportunities for addressing them. The audience was given an overview of how philanthropy can have a bigger impact combating unacceptable poverty and inequality levels; widening access and inclusion so more benefit from opportunities; supporting people to live healthier and safer lives; strengthening culture, community life and the resilience of our places; and taking and resourcing action to address climate change. The Foundation's CEO, Rob Williamson, also outlined three key calls to action for the public and private sectors, individuals, families and wider civil society in the North East.

Claire Malcolm of New Writing North and a trustee of the Community Foundation chaired a panel reflecting on Vital Signs, with Abigail Pogson, Managing Director of The Glasshouse; Anne Reece, Chair of the Reece Foundation; Martin Brookes, Chief Executive of Voluntary Organisations Network North East (VONNE); Ngozi Lyn Cole, consultant and non-executive director; and Wayne Dobson, Chief Executive of the Cedarwood Trust.

“

Although many of the challenges that the North East faces are persistent and often worsening due to the economic climate I felt that there was hope and commitment in the room to work towards making things better. To feel this energy from the third sector, funding stakeholders and philanthropists feels good. The North East is great at working together and devolution, our new Mayor with her commitment to turning the dial on childhood poverty and new leadership in central government gives me hope that we can make change happen collectively. We all have a part to play”.

**Claire Malcolm**





# Investing assets responsibly

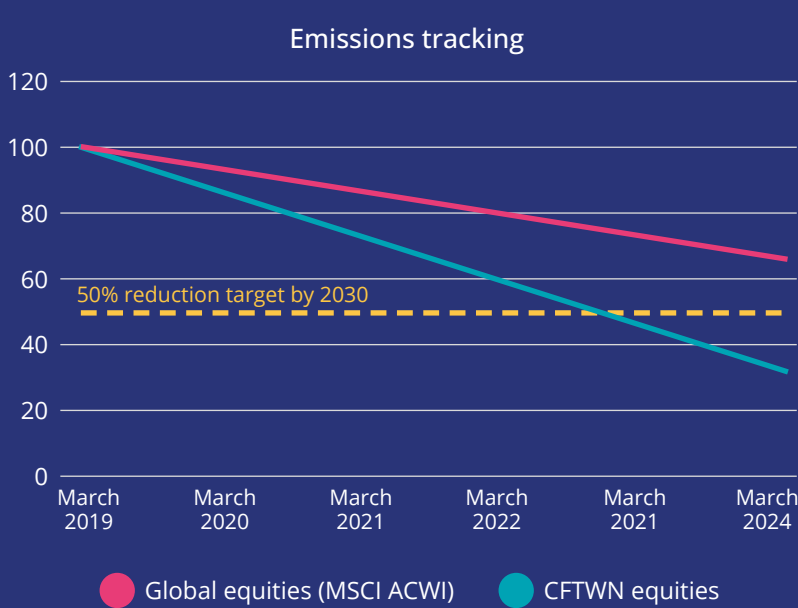
The Community Foundation endowment model means we can provide a permanent funding stream now and in the future. But stewarding our assets also means investing responsibly.

We delegate management of our endowment investments to three firms – Cazenove Capital, CCLA Investment Management Limited and Rathbone Investment Management Limited – whose approach integrates environmental, social and governance factors alongside financial returns. With their support, we can now start reporting progress against our responsible investment goals. Over time, we hope to expand this information.



## Net zero

We seek to align with the UN Paris Agreement and commit to our investment portfolio being net zero by 2050, but with early progress to at least a 45% emissions reduction by 2030. Data from our managers shows that by 31 March 2024, the carbon emissions of our share portfolio has reduced below the 45% target.



Above:  
A walk in Kielder led by the Syrian Youth Support Worker Trainee from Cramlington Voluntary Youth Project.

In 2024, the carbon footprint of our shareholdings was 48% lower than a comparable benchmark of investments – a difference equivalent to the annual energy use of 7 homes.



## Examples of engagement by our managers with companies we own.

### Human rights – Cazenove

We joined 33 other institutional investors to engage tech companies with the aim of strengthening management of human rights risks and impacts. As part of this we wrote to **Alphabet** (owners of Google) asking them to disclose measures taken to mitigate and prevent harm to vulnerable groups. We also want to understand how they manage the conflict between the business model and its reliance on advertising revenue to drive traffic, and ensuring the associated content doesn't violate human rights, especially for vulnerable groups such as children. This collaborative engagement aims for a constructive and efficient dialogue, coordinating a larger group of investors with similar interests. The purpose of the letter was to initiate a dialogue which we expect to last for a period of three years.

### Mental health – CCLA

We launched the 2024 **Corporate Mental Health Benchmark** in June. It ranks 101 UK-listed companies on their approach to workplace mental health into one of five performance tiers. Since last year's benchmark, we have been meeting companies and explaining the social and economic value to be unlocked through concerted efforts to support employees. Over the past 12 months, 70 UK-listed companies have engaged with us on this topic, many of which are not held by CCLA. The 2024 results reveal that 24 of the UK's largest listed businesses have improved their performance over the year sufficiently to move up a tier. Since the first benchmark in 2022, 45 UK companies have improved, with profound implications for the health of employees worldwide.

### Climate change – Rathbones

To limit global warming to 1.5°C, the Intergovernmental Panel on Climate Change thinks the world must reach net zero emissions by 2050. The International Energy Agency thinks investing in new oil and gas fields must stop to achieve this. As these projects are often funded by banks such as **Barclays**, we're engaging with them on changing their approach. We joined investors in filing a resolution for Barclays' 2024 AGM calling on the bank to stop funding new projects that increase fossil fuel production. The resolution was withdrawn after Barclays committed to do this – but we've told them we're prepared to escalate our engagement if it doesn't close loopholes in its new policy.

Responsible investment data is compiled by Cazenove Capital using data shared by all our managers. More information is available from our office.

## Engagement

We expect our investment managers to vote at company AGMs and engage with them on matters important to us and our stakeholders.

- 228 Number of shareholder resolutions for companies in our portfolio
- 220 Votes cast by our investment managers
- 96% Percentage of resolutions voted on by our investment managers



# Our funds

These pages list our current funds by type and donor category.

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	Esmée Slattery Fund	Mitford Fund for Northumberland Fund	Templeton Fund
Crosshatch Fund	Ian and Jane Gregg Fund	Sutherland Fund	Tony Follows Legacy Fund
Crozier 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 invested 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 invested or £30,000 for an annual fund.

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

Operating funds

These funds support the costs of our charitable activities. Named operating invested 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	
Brian Lewis Fund <b>NEW</b>	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 invested funds can be started with £25,000. Annual field-of-interest funds start at £10,000.

Funds set up by individuals and families			
Anne and David Parker Fund	FB & PFB Lough Fund	Lady Betty Martin and Sir Lawrence Martin Fund	Sandra King Rainy Day Fund
Brian and Margaret Thompson Fund	George and Peggy Fund	Langley Family Fund	Spriggs Family Fund (including Community First)
Burnell Family Funds (including Community First)	George Loggie Fund	Linden Family Funds (including Community First)	The HunterPemberton Community First Fund
Carrie Reay Grassroots Fund	Grigor McClelland Fund (including Community First)	Marian Winship Fund <b>NEW</b>	The Lawrence Campbell Community First Fund
Christopher Beadle Fund	Hillside Fund	Nash Fund	The Muriel Campbell Fund
Cynthia Hoare Fund <b>NEW</b>	Ivy and Gilbert Purvis Fund	Pamela Denham Grassroots Fund	The P Z Fund
Daisy Marr Fund	JesDesStaff Fund	Prime Fund	Tyne & Wear Grassroots Fund
Express Enterprise Fund	Josephs Family Fund	Riverbank Fund	Winter Family Fund
Fausta and Rosemary Community First Fund	June King Fund	Rod and Rosemary Taylor Family Fund	
	Kellett Fund		

Funds set up by businesses			
Akzo Nobel International Paint Fund (includes Community First)	John Laing Fund	Northumberland Group Fund	Rolls-Royce Fund
	JPMorgan Fund	Port of Tyne Community Action Fund	Vaux Fund
Canford Audio Fund	North East Brewers Fund		

Funds set up by charities and trusts			
Abbot Memorial Fund	Dickon Trust Fund	Newcastle Dispensary Relief in Sickness Fund	Rose Joicey Fund
Ashington Community Development Trust Fund	John Bell Fund	North Tyneside Fund	RW Mann Fund
Chapman Fund	Joseph Brough Charitable Trust Fund	Roland Cookson Community Fund	
Coquet Fund	Lady Noble Memorial 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 invested 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	Barnes Fund	Chrysalis Fund	Evangelical Fund
Adderstone Fund	Barry and Faga Speker Fund	Curtin PARP Fund	Fogo Funds (including Community First)
Adrian and Ingrid Gifford Fund	Bellingham Fund	Daphne and Martin Cookson Fund	Geoffrey and Ann Purves Fund
AJM Fund	Blackett Family Community First Fund	David and Gitta Faulkner Fund	Groves Family Fund
Alan Morse Grassroots Fund	Brian Roycroft Fund including the Tessa Hide Fund	Dream Jar Fund	Guy Readman Endowment Fund
Andrew and Charlotte Dixon Fund	Carolyn and Tony Brookes Fund	Duncan and Sarah Davidson Fund	Henderson Family Fund
Anonymous R Fund	Carroll Savage Fund	Elgon Fund	Heyman Travelling Scholarships Fund
Appletree Fund	Caru Fund <b>NEW</b>	Emma Newton Fund	



Hoult Family Funds (including Community First)	Milburn Briel Fund	Robinson Fund	The Edwin John Easydorchik Travelling Scholarship Fund
I'Anson Family Fund	Nancy Barbour Award Fund	Ron and Louise Bowey Funds (including Community First)	The Hokey Cokey (that's what it's all about) Funds (including Community First)
If Only... Fund	NEF Grassroots Fund	Sara Alexandra Bernstone Fund	The Louise Dalton Fund
Jackie Haq Fund	North East Endowment for Musical Traditions Fund	Shipley Family Fund	The Lucy Winskell Fund
John and Barbara Sadler and Jeanette Henderson Fund	Out and About Fund	Shobha and Triloki Srivastava Grassroots (including Community First)	The Pea Green Boat Community First Fund
John D Endowment Fund	Pamela and Dorothy Denham Fund (including Community First)	Sir Tom Cowie Fund	Thornton Family Grassroots Fund
Johnnie and Tricia Smith and Family Fund	Patch Fund	Smail Family Fund	Three Valleys Fund
Kerry Funds (including Community First)	Percy Family Fund	Sowler Family UK Charitable Fund	Treeline Fund
Leech Challenge Fund	Platten Family Fund (including Community First)	Speke Family Fund	Vicky F Grassroots Fund
Lendrum Family Community First Fund	Proudfoot Family Fund	Star Fund	Watkin Family Fund
Margaret and Dorothy Gordon Memorial Fund	Readman Family Grassroots (including Community First)	Stephen Byers Fund	Weightman Fund
Mark and Ian Wilson Family Fund	Readman Foundation Fund	Storey Family Grassroots Fund	Welch Family Fund
Matthew Ridley Fund	Reeds Funds (including Community First)	Sue Wilson Fund	Wide Open Road Fund
Maudslay Family Fund	Riddell Family Community First Fund	Suz Grassroots Fund	William Leech Charity Fund
McIntosh Fund	Riding Grange Grassroots Fund	Ted Weekes Fund	Willis Charitable Fund
Michael and Christine Heppell Fund		Tess Fund	

Funds set up by businesses

Amec Legacy Futures Fund	Benefit Fund	Northern Powergrid Fund	Ringtons Fund (including Community First)
Bellway Fund	Fergusons of Blyth Fund	Northumbrian Water Fund	RWE Renewables Kiln Pit Hill Wind Farm Community Fund
EDF Renewables Blyth Offshore Demonstrator Wind Farm Community Benefit Fund	Muckle Fund	Opencast Charitable Fund	Squires Foundation Fund
EDF Renewables Green Rigg Wind Farm Community Benefit Fund	Nadara Sisters and North Steads Wind Farm Community Benefit Fund	P&G Fund	Virgin Money Endowment Fund
EDF Renewables Barmoor Wind Farm Community	Naylors Gavin Black Fund	Pattinson Estate Agents Fund	Ward Hadaway Fund
	Newcastle Building Society Community Fund	PricewaterhouseCoopers Fund	
	Northern Gas Networks Community Partnering Fund	Ray Wind Farm CIC Small Grants Programme Fund	

Funds set up by charities and trusts

Barley Hill Fund	David Dockray's West End Young People's Fund	Northumberland Village Homes Trust Fund	The George Cringle Scholarship Fund
Berwick Academy Endowment Fund	FARNE Fund	Robert Wood Trust Fund	The Pargiter Trust Fund
Bill and May Hodgson Fund	Frederick Milburn Fund	Sunderland Industrial and Reformatory School Fund	Wellesley Trust Fund (including Community First)
Capt. C.D. Leyland Fund	G S May Family Fund	The 1989 Willan Charitable Trust Fund	
Charles Robert Bell Fund	Joyce Trust Fund		
CrecheMobile Fund	Latterford 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 invested 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	Jane Robertson Alnwick Fund	Joy Higginson Fund for Children North East	St Cuthbert's Fund
David Goldman Awards Fund	Jeremy Beecham Schools Fund	Moor Fund	Stuart Ayre Fund
Frank Acfield Fund			Taylor Fund

Funds set up by businesses

Bonas Machine Company Fund

Funds set up by charities and trusts

Allison Greenlees Continuation Fund	Bird Fund	Carr-Ellison Charitable Trust	Roland Cookson Fund
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**Agency invested funds**  
These charities have funds at the Foundation which provide continuing income for their work. Agency invested funds can be started with £100,000.

Agency Endowment Funds

Chronicle Sunshine Fund	Northumberland Wildlife Trust Fund	Tiny Lives Fund
Enid Blyton Fund for Seven Stories	Prudhoe League of Friends Fund	The Glasshouse International Centre for Music 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

#iWill Fund – in partnership with the National Lottery, DCMS and UKCF	NHS North East and North Cumbria Northern Cancer Alliance Fund <b>NEW</b> – in partnership with Cumbria Community Foundation and Point North	Participatory Grant-making Fund – Black, Asian and minoritised ethnic communities	The South Tyneside Know Your Neighbourhood Fund – in partnership with DCMS and UKCF
Community Chest Fund – in partnership with Gateshead Council	NHS North East and North Cumbria Waiting Well Fund <b>NEW</b> – in partnership with Cumbria Community Foundation and Point North	Participatory Grant-making Fund – Sunderland	Third Sector Trends Study
Newcastle Culture Investment Fund - in partnership with Newcastle Council	North East Social Investment Fund – in partnership with Better Society Capital, Esmée Fairbairn, Joseph Rowntree and Northstar Foundations	The Community Infrastructure Levy (CIL) Fund in partnership with Gateshead Council	Vital Community – Sector Support Fund
		The Sir George Earle Benevolent Fund <b>NEW</b> – in partnership with UKCF	Waiting Well/Preparing Well

We also provide expertise and advice to the Bernicia Foundation and Ridley Family Charity



# 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 with others

Through the Community Foundation, you can give with others to make a bigger difference. Our collective funds cover issues like young people, women, arts and culture and the environment. Others help a particular part of our area. We also have giving initiatives for younger professionals, for companies of all sizes and for people whose roots are in our region. You can support a current fund or talk to us about new areas where people could come together to give.



## Start your own fund

You can start a charitable fund with us for yourself, your family, your business or a professional client. You can set up an invested fund, where gifts are held as capital earning income each year to help your chosen causes. Or you can have an annual fund, with gifts held as cash to help causes each year. Some people choose a combination of invested and annual funds. For both, we have options to suit how involved you want to be. 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.

## Donating Cryptocurrency to the Community Foundation

We now accept donations in Bitcoin, Ethereum and many other leading cryptocurrencies. Through our partner, The Giving Block, you can donate crypto securely and tax efficiently and we get the equivalent value in cash.

You can donate crypto to support the Community Foundation's work overall, or to one of our funds. You can also set up or add to your own fund at the Community Foundation with crypto. Find out more: [www.communityfoundation.org.uk/give-crypto](https://www.communityfoundation.org.uk/give-crypto)



“

“The Giving Network is a great way for many individuals to give a little, but with a significant collective impact”.

**Stephen Ward**  
Giving Network member



“

“With the Foundation's knowledge and expertise we know that the money is going where it is most needed and I'm certain our whole ESG programme would not be as advanced as it is without the valuable input that we have had from the Foundation.”

**Hugh Welch**  
Senior Partner, Muckle LLP



“

“The Willis Charitable Fund was set up by my dad, Peter, at the Community Foundation in 1999, and was designed to support organisations in education, music and the church. These were subjects very close to his heart and he was rightly proud of the effect the Fund was able to have. One of the brilliant things about the Community Foundation is that it does the work of identifying the organisations that can most benefit from our fund.”

**Magnus Willis**  
The Willis Charitable Fund

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



# Our people

- HONORARY PRESIDENT**  
His Grace the Duke of Northumberland

**HONORARY VICE-PRESIDENTS**  
Lord Beecham  
Lord Beith  
Fiona Cruickshank OBE  
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**  
*Non-executive director and business investor*



**Lucy Winskell OBE LL**  
*Lord Lieutenant of Tyne & Wear*



**Paul Farquhar**  
*Company director and accountant*



**Jill Baker**  
*Director of Communities, Lloyds Bank Foundation*



**Michael Brodie CBE**  
*Chief Executive, NHS Business Services Authority*



**Sarah Glendinning**  
*Director of Business Partnerships, Northumbria University*



**Andrew Haigh**  
*Chief Executive, Newcastle Building Society*



**Colin Hewitt**  
*Senior Partner, Ward Hadaway*



**Claire Malcolm MBE**  
*Chief Executive, New Writing North*



**Stella Simbo**  
*Digital Inclusion Health and Social Care Project Manager, Connected Voice*



**Pam Smith**  
*Chief Executive, Newcastle City Council*



**Fiona Standfield**  
*Chief Operating Officer, Diocese of Hexham and Newcastle*



**Dr Laura Warwick**  
*Senior Service Designer, NHS Business Services Authority*

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.

# Our staff

- SENIOR EXECUTIVES**

**Rob Williamson OBE DL**  
Chief Executive

**Adam Lopardo**  
Chief Funding and Partnerships Officer

**John Hollingsworth MBA**  
Chief Philanthropy Officer

**Sonia Waugh FCCA**  
Chief Finance and Operating Officer
- KNOWLEDGE AND RESEARCH**

**Mark Pierce**  
Associate Director of Knowledge 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 and Development Advisor

**Kevin Maloney**  
Philanthropy and Development Advisor
- PROGRAMMES AND PARTNERSHIPS**

**Nils Stronach**  
Head of Grant Practice and Programmes

**Pete Barrett**  
Senior Programme Advisor

**Jo Cundall**  
Senior Advisor, Culture

**Ged Robinson**  
Grant Programme Advisor

**Colette Harrison**  
Development Officer, Sector Support

**Ali Walker**  
External Relations Officer

**Beverley Timlin**  
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

**Leanne Wilson**  
Grant Process Co-ordinator

**Jacqueline Turner**  
Office Administrator

**Top right:**  
Staff team – front from left: Ged Robinson, Rob Williamson, Su Legg, Lisa Cappleman, Elaine Holdsworth, John Hollingsworth, Ali Walker. Second row: Adam Smith, Pete Barrett, Beverley Timlin, Jo Cundall. Third row: Nils Stronach, Colette Harrison, Mike Whitfield, Michelle Hardie. Back row: Ross Wilson, Adam Lopardo, Kevin Maloney, Sarah Phillipson.

**Below:**  
Young people performing at Mortal Fools in Ashington.





## Advisors

**Auditors:** Azets Audit Services

**Bankers:** Barclays Bank plc

**Investment Managers:** Cazenove Capital, CCLA Investment Management Limited, Rathbone Investment Management Limited.

**Solicitors:** Muckle LLP

Financial information and grant statistics in the Yearbook relate to the financial year 2023-24. All other information has been updated to the time of going to press in October 2024.

Our grants data is available on our website [www.communityfoundation.org.uk/about-us/our-data](http://www.communityfoundation.org.uk/about-us/our-data) and on 360Giving [grantnav.threesixtygiving.org](http://grantnav.threesixtygiving.org)

**Design and artwork:** Lisa Kirkbride

**Photography:** Rosella Studios, True Colours Theatre, Mike White, Company of Others, CREST (Compact for Race Equality in South Tyneside), Blyth Harbour Commissioners (Port of Blyth), Gilbert Johnston Photography, Cramlington Voluntary Youth Project

**Cover image:** Unfolding Theatre performing an excerpt from their play 'A Street Like This' at the Community Foundation's North East Roots Showcase on 11 October 2023.

### Community Foundation serving Tyne & Wear and Northumberland

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in cftynewearnland

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