

OUR ANNUAL REVIEW

2018/19





‘ WE HAVE THE
TO AID YOUR
AND ENSURE YOUR
MAXIMUM



**KNOWLEDGE
DECISION MAKING
GENEROSITY HAS
IMPACT. ,**

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about us

Heart of England Community Foundation is a charity that raises money to fund and develop community activity across the West Midlands and Warwickshire.

Working with a diverse range of donors, we award funding to community projects tackling some of the most pressing societal needs.

We believe that local people have the knowledge and skills to tackle the issues affecting their communities. We have the expertise to work alongside them, investing in their ideas to help make positive change a reality.

The organisations we support rely on us because they often fall below the radar of national funders, we provide a vital lifeline to help them become sustainable and provide the best outcomes for our region.

The Foundation was established on Valentine's Day 1995 and is now well into its 25th year.

Across two and a half decades we've distributed over £20 million to almost 6,000 projects.

foreword

It has been an enormous pleasure to serve as a member of the Heart of England Community Foundation Board during the last five years.

During that time the Community Foundation has grown from its heartland of Coventry and Warwickshire to embrace the major conurbations of Solihull, Birmingham and the Black Country. This has involved a transformation of all the Trust's activities and funding capacity.

Tina Costello and the executive team she leads deserve the highest praise for attracting and inspiring the confidence and trust of all the funders who have made this possible.



The Heart of England has become one of the leading Community Foundations in the UK and a major provider of community projects and activities across the West Midlands.

The Board of the Foundation has set a high standard of governance, financial and investment oversight helping to underpin its long-term growth and sustainability and following my retirement from the Board later this year I look forward to supporting its future success.

Sir Dominic Cadbury

chairman

Prioritising where to spend limited resources and locating more continues to challenge us all at the Foundation. We work with groups needing support throughout the West Midlands and as a Board we have consciously set out to ensure that we do provide funds focussed on need throughout the region.

As part of our strategy this year we have commissioned Coventry University to undertake a socio-economic report of Coventry, Warwickshire and Solihull which follows our “Communities Uncovered” report into Birmingham & the Black Country. This evidence-based research will enable us to develop programmes that truly meet the needs of communities across these areas.

Our fantastic staff team have achieved much in the last 12 months. The Building Better Opportunities project in the Black Country has managed to improve employability prospects for over 1,145 people. Working with various Local Authorities across the region we have started to unlock funds in Trusts that have not been as effective as they might have been in recent years

Building superb relationships with great West Midlands based businesses like Wesleyan, IM Properties and PSA Groupe has continued to develop our funds and supporter base.

Some brilliant programmes secured through our affiliated body UKCF were also delivered. These include Nationwide Building Society, Tampon Tax Fund and an anonymous donor providing grants to enable organisations to build the capacity and sustainability of their organisations.

We continue to work under our 3-year strategic plan and are closer to realising our ambition of a £20 million investment, increasing our endowment by £2.1 million in the last 12 months. This is another huge achievement which demonstrates the trust and faith donors have in our work.

Last but certainly not least, a huge thank you to all of our donors, supporters and friends, without you, we could not exist let alone flourish in the way we are. Here's to continued success for all!

Phil Ewing



chief executive

What an exciting, challenging and successful year it has been for the Foundation! We have built many new strong relationships, secured significant new funds and launched our largest ever grants programme, Building Better Lives.

This major new initiative has been made possible through some incredibly generous anonymous donors who initially gave us £4 million to develop and implement a major capital build programme around housing vulnerable people. The donors were so impressed with our ability to create, shape and develop plans for the programme that they donated a further £1.58 million for us to use as we wish, demonstrating their trust in us.

Announcements on the successful organisations will be made in Autumn 2019. To put this into context our average grant size for 2018/19 is £3,117 – here we will be awarding 3 organisations a share of over £3 million!

We are proud to have our main office in Coventry where great things are set to happen following the success of winning the City of Culture 2021 title. Working with the Trust who are to deliver the plans for 2021 and beyond, we are currently managing two funds to enable individual artists and groups to develop their practice, organisation and ideas for then.

We have increased our dedicated staff team and with strategic direction and full support from a committed Board of Trustees we are proud to say it has been another brilliant year for the Foundation.

However, with an overall success rate of only 45% of all eligible applications to the Foundation, we are fully conscious that we always need to attract new donors who believe in investing in their local communities. Together we can change the lives of even more people living across the West Midlands. Please work with us to identify new donors.

Tina Costello



highlights

2018 - 2019 >>>>



> APRIL 2018 HIGH SHERIFF AWARDS

The Foundation, alongside the former High Sheriff of Warwickshire Mark Davies, awarded £5k to 10 charities who were making a difference in Warwickshire.

> MAY 2018 BUILDING BETTER LIVES

Thanks to a £4m anonymous donation at the end of 2017 the Foundation opened the Building Better Lives programme, a substantial capital grants fund.



> AUGUST 2018

Staff spent a day testing their leadership and strengthening their teamwork with some horses at Jude Jennison's Leading Through Uncertainty.

> SEPTEMBER 2018

WESLEYAN £1M LANDMARK

We were delighted to have awarded £1m to 299 projects through our partnership with Wesleyan Assurance.



> DECEMBER 2018

CHRISTMAS QUIZ

Our annual Christmas Quiz pitted 17 teams against each other, raising £950 for good causes.

> JANUARY 2019

IM PROPERTIES LAUNCH

The Foundation gained a new partnership and launched the Peddimore Community Fund alongside Birmingham based developers IM Properties.



> JUNE 2018

ANNOUNCED AS A CITY OF CULTURE PARTNER

It was an honour to be appointed Coventry City of Culture Trust's giving partner. Through the first round of funding we awarded 21 grants across the city.

> JULY 2018

COVENTRY UNIVERSITY COMMUNITIES UNCOVERED

Following the success of our Communities Uncovered report on Birmingham and the Black Country the Foundation is leading another research project for Coventry, Solihull and Warwickshire.



> OCTOBER 2018

MAILBOX CELEBRATION EVENT

We hosted our annual event in Birmingham's Mailbox, the evening was a great opportunity to showcase the work of the Foundation across the city.

> NOVEMBER 2018

£2M ANONYMOUS DONATION

Following an anonymous donation of £4m in 2017, the same donors gave the Foundation an extra £1.58m to continue our work with disadvantaged and vulnerable people.



> FEBRUARY 2019

TAMPON TAX MONEY DISTRIBUTED

We were able to award £162k to organisations supporting women and girls in the region, but sadly, we had to reject £700k worth of applications due to oversubscription.

> MARCH 2019

RAINER DEVELOPMENTS & FAITHFUL+GOULD JOIN OUR PANEL

We were delighted to welcome Richard Mees, managing director of Rainier Developments and Russell Bailey, Director of Building Services for Faithful+Gould to our Building Better Lives panel. The additions will add expertise and support the Foundation in delivering our largest ever grant awards.

**our year
in numbers**

**£2.3m
Awarded**

**330,589
People set to benefit**

760 Grants Awarded

55 Funds Managed

amount awarded
per city/region

£568k
Birmingham



£416k
Coventry



£296k
Black Country



£181k
Warwickshire



£40k
Solihull



top 5 project
themes



homelessness
& poverty



tackling
crime &
re-offending



caring,
disabilities
& wellbeing



community
development
& inclusion



arts,
culture
& heritage

Case Study:

Hunters Hill Charitable Trust, Birmingham

**EDUCATION,
TRAINING,
MENTAL HEALTH
& WELLBEING**

“We’re all good at something, it’s just finding out what it is!”

Tucked away in the outer city, Hunters Hill Charitable Trust is working hard to drive new opportunities.

The Trust supports Hunters Hill College which educates 11 to 16-year olds with complex mental health needs and family related problems.

Their Motor Vehicle course gives students the chance to try their hand in a working garage, setting them up for, not only the next step in their education, but life as well.

Andy Bencens, Motor Vehicle Teacher, said: “In the main kids come to us in year 10, but we’ve just started doing an introductory class for year 9’s. If they like it, it might just give them an insight and help them make some decisions.

“They study with the Institute of the Motoring Industry which is probably the biggest organisation that oversees the motor vehicle trade.

“We’re giving these kids practical skills, we always say we don’t expect them all to become mechanics but if

nothing else, we’d like you to be able to save some money in the future!”

But working in this school comes with its challenges: “We do have a Psychologist on site to support us.

“You’ve got to give people that first chance, that first step on the ladder. What we offer here is the closest you could possibly get to a working environment.

“The biggest carrot for us is the workshop. The cars out there are ‘live’, they’re customers cars and we charge for repairing them. This gives them a purpose, they’ve done a job and they get a huge sense of responsibility.”

With his head under the hood, student Daniel, said: “I love it. This is our best lesson to be honest and you learn some life skills!

“It’s helped me get into college, I’ll be doing an automotive

course, I probably wouldn’t have chosen that if I hadn’t been on this course.

“It’s great because I’ve already used what I’ve learnt on the course. One day I was at my mates and a car pulled up with a flat tyre. They didn’t know how to change it, so we put a spare on for them! You’d be amazed at how many people don’t know how to change a tyre.”

Hunters Hill Charitable Trust were awarded a grant of £1,200 from the Deutsche Bank Small Grants fund to help them continue their Motor Vehicle provision.

Fire exit →



Case Study:

Academy for Karate, the Black Country

YOUNG PEOPLE,
SPORT &
WELLBEING

“I’m committed to giving opportunities to young people.”

Approaching a sports hall in Wolverhampton, we hear unified shouts and the stamping of feet.

There’s not a space left on the gym mats as the Academy for Karate’s Sensei, Hernani Gabriel puts the children through their paces.

The organisation provides multiple affordable karate classes to young people in Wolverhampton and the surrounding areas.

Hernani said: “It’s very important to be able to give local youth the opportunity to experience social activities.

“The classes encourage positive mental health and improve social skills along with promoting physical health. Participating in sports develops healthy living habits that provide benefits such as improving coordination, physical fitness and strength.”

But the classes don’t just benefit physical and mental

attributes, observing the class it was amazing to see how much control the Sensei had over the large group: “Here we develop soft skills like punctuality, discipline, perseverance, improved self-esteem and enhanced motivation.”

Hernani is continually looking to involve those in the community and improve the Academy: “Over the years this area has been identified as one of the less affluent areas in the city.

“I’m committed to giving opportunities to young people that feel excluded due to finances. It’s very important to have the community engaged and included in the social fabric of the city, helping to prevent anti-social behaviour and criminality.

“We’d like to expand in terms of engaging with more children

and interacting with other, equally less, affluent areas of the city.”

Leaving the session, we spoke with Mandeep, a parent who was picking up his daughter: “She enjoys it, it’s good for fitness. It keeps them busy and gives them an opportunity to learn self-defence, discipline and routine.

“It’s a brilliant group which is great for them to make friendships! “

The Academy for Karate was awarded £1,500 from the Birmingham & Black Country Community Fund.



Case Study:

Solihull Indoor Bowls, Solihull

SPORT, OLDER PEOPLE & REDUCING SOCIAL ISOLATION

“It takes a weight off our mind.”

All the lanes in Solihull Indoor Bowls Club are booked up, you wouldn't have guessed it was 'Blue Monday'.

The Club is a community asset, providing individuals with a purpose, a space to socialise and a means of keeping active.

League Secretary, Denis Aitchison, said: “In the winter this is what really gets me out of the house. I can't go walking because of knee injuries I suffered from when I was younger.

“For me, and I'm sure for many other members, it's a really good facility. It's gets you involved in an activity and helps you socialise.

“You might bowl with someone you've never bowled with before and you might quite like them!”

The Foundation awarded the Club a grant of just £299 from the Coventry, Solihull and Warwickshire Fund, this enabled them to replace the batteries in their defibrillator.

Denis went on to say: “To have the defibrillator is a necessity for the age group we've got. I'm not sure it's a legal requirement but it would certainly seem to us that without it, we're not paying due attention to our members welfare.

“I'm over 70, there are many members over 80 and a good sprinkling over 90 as well! It takes a weight of our mind that we have a grant for this, maybe it was relatively small amount in the grand perspective, but its another cost that won't come out of the reserves.”

Finances are a concern for the club, as it is for many sport and social clubs.

Paul Rees, Director, said: “Over the last few years the income has not matched the outgoings but over the last 12 months we're starting to show signs of arresting that decline.

“It's hard for us to earn £300 net profit to spend on a defibrillator, it's a lot of cups of tea! It's great being able to offer that peace of mind to our members.

“With 400 members, 70 - 80% are over 60, the potential for somebody to have a heart attack is higher in comparison to a squash or a football club. But fortunately, we've never had to use it!”

With a brilliant space the Club are trying to maximise their earning potential: “We need to get the message out in the area that yes, we are a bowls club, but we also have brilliant facilities that can really benefit the community.”

Case Study:

Friends of Castlewood School, Coventry

**CHILDREN WITH
ADDITIONAL
NEEDS &
THEIR FAMILIES**



“I was in the right place.”

It's Saturday morning and there's a stampede of children as the doors at Castlewood School fling open.

Friends of Castlewood School run a Saturday club for children with additional needs.

Sue Rumble, Group Fundraiser, said: “We've been running for 10 years. We normally have about 50 kids and we've 30 on the waiting list as a lot of these children can't use mainstream activities.

“We split them up into six different groups depending on their needs. Some children are non-verbal, some are very autistic, we've a group in wheelchairs, two girls with brittle bones which can be quite tricky.”

This organisation also provides much needed care for siblings: “If there's a child with needs their sibling can come as well. Sometimes at home, they don't get pushed out as such, but their sibling gets priority. They don't moan about it, but here they can share their experiences with others.”

And of course, thanks to the excellent care, parents are provided with some much-needed respite.

Asia's son, Rhasid, uses the service: “Having a child with special needs can destroy more able families, for me it meant having no more kids and sitting at home making sure Rhasid is ok.

“It can be quite a big, deep, dark world. Even family members don't understand. Since coming to this provision it's helped me get back into working.

“I don't want to sound selfish, but it gives parents a chance to get on with things we need to do. Saturday Club is a blessing, I'm so happy.”

Unfortunately, when children reach 11 the service is no longer available to them. Something Ravinder, another parent, is coming to terms with: “The service isn't just on a Saturday, they're always there to support us and answer any questions.

“I'm worried about my son being too old for the service, I'm trying not to think about it to be honest.”

Finally, we caught up with Ella. Her son has autism but her

daughter, as a sibling, takes advantage of the club: “The provisions are really good here, for £20 there are loads of things available.

“My youngest is profoundly autistic, I knew from the moment I came here that I was in the right place. They know how to talk to me and my child.

“My elder child is very withdrawn and needs to be part of a group too, she makes friends here. This makes me feel fantastic. Finding a playgroup is impossible for Julian and it's so important that my daughter Olympia has somewhere to go as well!”

Friends of Castlewood School were awarded a grant of £1,000 from the Harry Payne Fund to help them continue their work.



Case Study:

Aspire in Arts, Warwickshire

YOUTH, FOOD POVERTY & HOMELESSNESS

“You know the money goes back into the community.”

Every Wednesday Nuneaton’s United Reformed Church plays host to a ‘pay as you feel’ community cafe.

Aspire in Arts is a not for profit organisation whose qualified youth workers work with young people to tackle issues in the community.

Kirsty Lowrie, Director, explained the project: “Some of our young people wanted to bring communities together, especially those who might be vulnerable.

“They’ve come up with this idea, and we’ve a couple of volunteers to help them as well! We get food donated from Edible Links, a local food bank. We change the menu every week and cook with whatever we’ve got basically.

“People just give us a donation, so whatever they want to pay, or can pay, is fine.”

The project, ‘Bites and Banter’, was awarded funding of £4,992 from the Foundation’s Youth Social Action Fund.

This is Aspire’s first venture away from youth work, but the money raised supports its core values:

“All our work focuses on youth and this is our first project within the wider community. We’re hoping the project will continue to run after the funding as people really seem to love it.

“We’ve a mix of people, we’ve those that are in supported accommodation, some that are homeless and then it’s open to anyone else! It’s something to do and it gets people out and about.”

Chatting away, while waiting for their food, are Margaret and Jean:

“We come to the market every Wednesday, so we come here as well, it just breaks the day up!

“They open at 12, you get a lovely meal. I’d recommend it to anyone because they’re so

friendly and it’s a good cause. You know the money is going back into the community. I’m having curry and rice, you want to try it!” said Jean.

Margaret tucks into her second omelette: “We’ve been here before, I think it’s brilliant. To be honest it’s the staff who make it, they’re just so helpful and lovely. The ‘pay as you feel’ is good too, it helps bring a lot of different people.”

community matters, last lap!

The Community Matters programme is in its final year. Having begun in 2016 the employment and skills project has so far engaged with over 2,400 people.

The Foundation is the lead partner of the Community Matters programme which is funded by the National Lottery Community Fund and the European Social Fund. The

programme is run through 15 partner organisations across the Black Country.

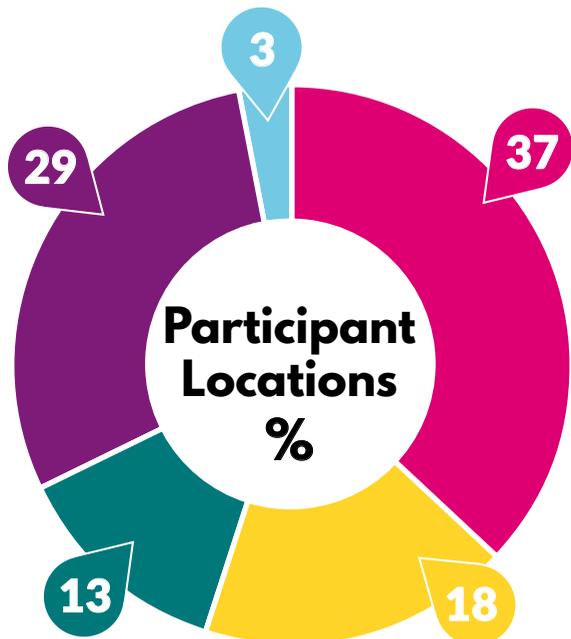
The partnership is delivering against a set of priorities which were developed by the Black Country Local Enterprise Partnership (LEP).

Community Matters is just one strand of the nationwide Building Better Opportunities programme and a quarter of the BBO strategic partnership in our region. The Foundation

is delivering the programme alongside Steps to Work, Walsall Housing Group and Black Country Together.

The project invests in communities and gives opportunities to those who want to reignite their futures. There will be over £23million invested into the region by the end of the project which is already breaking down barriers and changing lives.

2018-19



- Wolverhampton
- Walsall
- Dudley
- Sandwell
- Birmingham

Case Study:

Access to Business, the Black Country

SUPPORTING PEOPLE INTO EMPLOYMENT & SELF-EMPLOYMENT

“His journey has been fantastic.”

Thanks to the Community Matters programme Ray has found his calling.

Access to Business, based in Wolverhampton, is a charity providing professional services to local people helping them into employment.

Simon Moore, Operations Manager, said: “We get a lot of referrals and what we tend to do is focus on those people that are furthest away from employment.

“When people come in, we sit them down and we listen to them. We find out what they want to do and what’s stopping them from doing it.

“A lot of people who’ve been out of work tend to lose their confidence and they go back into their shells, finding it difficult to engage with people.”

Someone who’s come on leaps and bounds since their arrival is Ray: “He was severely bullied in his last job and walked out, he had a complete nervous breakdown. He was out of work for 6 years.

“The job centre sent him here two and a half years ago, he couldn’t even look me in the eyes, he was very timid and just looked at the floor.

“We had a chat and found out what his strengths were, he had severe

social anxiety, but he’s a whiz on a computer!

“We got him to come to a class for people who’ve never used a computer before. Ray really enjoyed these sessions, although he wasn’t learning any IT skills he was learning how to engage with other people.

“He’s been volunteering for 18 months and he’s been absolutely fantastic. We’ve taken Ray on so he’s actually a member of staff now! He’s got the job here because we know what he’s like as a volunteer. His journey has been fantastic!”

Ray modestly spoke about his achievements: “I came here on a suggestion from the job centre, I chose to volunteer in the IT room, just helping people who didn’t know how to use computers.

“I’ve enjoyed helping people. It’s been good for me because I’m inherently helpful.

“I’ve gained a bit of confidence but that’s mainly because I’m in an environment that I’m comfortable in.”

Several participants, including Ray, were put forward for work

placements at Lloyds Bank: “The programme was suggested to me, they thought I might like to experience a modern office environment because that was where I wanted to go.

“I hadn’t experienced a proper office environment before, so going there was good. There was a lot of shadowing, seeing what they did, and I even helped with a couple of things, as I do!”

Those who completed the placements were invited to a special event to recognise their successes.

The Building Better Opportunities programme, is funded by The National Lottery Community Fund and the European Social Fund (ESF) who are co-investing in local projects tackling the root causes of worklessness, promoting social inclusion and driving local jobs and growth.

Community Matters is one of four projects within this programme across the Black Country and will help people across Walsall, Wolverhampton, Dudley and Sandwell move into or closer to employment by developing their skills and confidence.

Community Matters is managed by the Heart of England Community Foundation in partnership with local organisations across the Black Country.

working with the foundation

We love working with like-minded organisations to improve the communities we're connected to.

Whatever causes you want to support we have the knowledge to target your funds to the passions close to your heart. But don't take our word for it...

IM Properties:

In January 2019 the Foundation teamed up with IM Properties and launched the Peddimore Community Fund. The fund of £270,000 will be split over a six-year period benefitting areas close to the new Peddimore Employment Park being built in Royal Sutton Coldfield.

David Smith, Planning Director at IM: "We've said from the beginning that Peddimore is all about leaving a positive legacy for the local community, and the Peddimore Community Fund is one of the many initiatives being undertaken by IM Properties to deliver real social benefits to the area."

Wesleyan Foundation:

This year we were delighted to surpass a huge landmark with the Wesleyan Foundation, awarding more than £1million to some amazing causes throughout the UK.

Our largest corporate donor, we've worked with Wesleyan, and eight other Community Foundations in our network to help support more than 300 projects.

Caroline Hill, Chief People & Strategy Officer, said: "We knew when we set up the Foundation that we would need help to run it.

"We are proud to have pledged over £1m to causes as varied as youth homelessness to mobile dentist units.

"Heart of England Community Foundation have helped us identify some exceptional projects in these areas and our support has made a huge difference helping local people to meet local needs."

Drayton Manor:

In July 2018 the Foundation were able to award vital funds to organisations based in Staffordshire thanks to the generosity of visitors to Drayton Manor. £17,000 was raised for community groups including those supporting survivors of abusive relationships.

£10,000 has already been split between five organisation Cohort 4, the Baby Support Hub, Home-Start, Liberty Staffordshire CIC and The Ex-mining Villages Partnerships.

George Bryan, Company Director at Drayton Manor, said: "We're pleased to be able to work with the Foundation and support our local community by helping to facilitate something worthwhile.

"All of the organisations chosen are very close to our heart and we hope we can continue to raise the necessary funds to help those from disadvantaged backgrounds to have a better quality of life."

Case Study:

SIFA Fireside, Birmingham

HOMELESSNESS, VULNERABLE ADULTS & EMPLOYMENT.

“I have to pinch myself.”

In Birmingham’s dynamic Digbeth district, SIFA works daily supporting vulnerable people in the city.

The organisation works with homeless and vulnerable adults helping them to take control of their lives.

One of SIFA’s employees, Leon, has seen first-hand some of the problems their clients have been through: “My life was chaotic, I was in and out of prison and I was on heroin and crack for 17 years.

“When you’re in that position you’re just one track minded. When you’re on substances, no matter what it is, you’re numb to emotion and feelings.”

Thanks to his determination and several volunteer opportunities he’s now supporting others in a full-time position; a role that has been funded through the Foundation’s Nationwide Community Grants Programme.

On becoming a Support Worker for SIFA Leon said: “To be where I am now, sometimes, the God’s

honest truth is I have to pinch myself.”

Previously a Peer Mentor with a partner organisation the role relied on his lived experience to guide others, but he wanted to progress: “I wanted to step away from that, I didn’t want to be ‘Leon the Peer Mentor with lived experience’ I just wanted to be Leon.

“The opportunity came up, I applied, and I’ve honestly not looked back since.

“We open the doors at 9am and it could be absolutely anything. Simple things like making a phone call to starting a universal credit claim.”

Carly Jones, Chief Executive of SIFA, said: “We met Leon when he was working for Shelter.

“The Support Worker position was good progression for him, it’s such a varied role providing general support for the clients through

a mixture of brief intervention work.”

Grateful for the opportunity Leon is proud of the work he’s doing for the community: “Obviously you’ve got to pay your bills, but it’s not about the money for me, it’s the job satisfaction.

“I’ve been offered jobs with more money since I’ve been here, but if I’m happy in a job I’m happy! Things are changing all the time here at SIFA, it’s exciting thinking about all the opportunities.”

The Nationwide Community Grants programme is a national fund managed by several UK Community Foundations. Funded by the Nationwide Building Society, the programme aims to make sure everybody has a place to call home. This role within SIFA provides advice and signposting guidance.

why us?

That's easy. Our knowledge of the West Midlands is second to none. So, wherever you want to see change, that's where you'll see it.

Our grants can produce instant results, supporting programmes, activities and initiatives that address all the issues you could think of, benefiting individuals that represent all the different demographics in our communities.

We're proud to work with a variety of donors and we'd love to work with you too!



Setting up a fund.

Establishing a named fund with the Community Foundation is one of the most effective ways of giving money to local causes without needing to set up a foundation or charity yourself. We support individuals, families and businesses to set up a named fund, it could be in memory of a loved one or in support of one or more causes close to your heart. We take care of the financial and legal requirements leaving you to work alongside us to fund vital work in local communities.



Becoming the charity partner for your business.

We work closely with businesses across the region to deliver effective corporate giving. Managing a range of social responsibility budgets, we support companies who have a clear social ambition and want to award funding to local charities through grants and donations. With hundreds of local causes in our portfolio we can work with you and your staff to direct your giving to support the causes you care about, in the communities where your clients and staff live and work.



Transferring your charity trust or assets to us.

Managing a charity trust can be a challenge for trustees. The responsibilities that come with this can become overwhelming, especially given that trustees are volunteers and responsibilities ultimately fall on a small group of dedicated individuals. Issues such as sustainability and trustee recruitment can lead to a loss of impact and eventually the trust could become dormant (moribund). The Charities Commission and the Community Foundation work closely together to ensure that trustees looking to revitalise dormant or ineffective trusts can release their funds to the Community Foundation to provide a powerful legacy.



What next?

If you'd like to discuss your charitable giving options please contact our Chief Executive, Tina Costello, via e-mail: tina@heartofenglandcf.co.uk

Case Study:

Coventry Building Society

THEY ARE AN ABSOLUTE PLEASURE TO WORK WITH

The Coventry Building Society (CBS) has worked with the Heart of England Community Foundation since 2012, they've used the Foundation's expertise and knowledge within the West Midlands to support a variety of projects.

Investing in communities

CBS has had its own charitable foundation since 1998 but over time, the building society began to struggle handling the workload. Needing to find a specialist partner to help yet wanting to remain involved they turned to the Heart of England Community Foundation.

Anna Cuskin, Corporate Responsibility Manager at the Coventry Building Society, said: "We wanted our grants to be available to worthwhile projects in

communities across our branch network.

"As a building society, we care about our members and we also care about the communities in which they live. But we found that we lacked the detailed knowledge to assess which projects were most able to benefit from our grants, especially when more and more applications were being made.

"We realised the Heart of England Community Foundation would be the ideal partner to deliver grants in our home region."

The outcome

Organisations making a difference can now apply for grants through the Foundation, saving the Building Society valuable time.

Priority is given to those improving the quality of life and opportunities in communities affected by disadvantage, deprivation and social exclusion.

One of the projects supported through the partnership was the 'Men in Sheds' initiative at George

Eliot Hospital in Nuneaton, which aims to bring together men who may be suffering from loneliness or social isolation.

Anna added: "Without the Foundation's close links, we might not have realised what a worthwhile project Men in Sheds is and as such may have overlooked it for a grant.

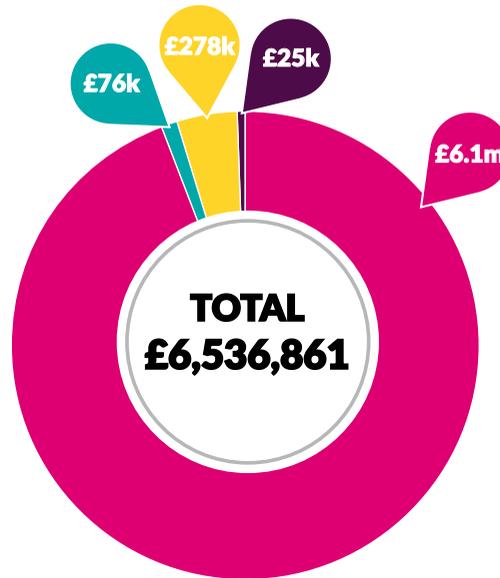
"It fits right in with our aims as a charitable foundation in terms of improving the lives of people in our communities.

"But that project is just one of many that have benefited from our partnership with the Foundation.

"The Foundation produces insightful reports about all our grant giving for us, so we can see exactly what groups and projects are being supported and how our grants make a difference to the communities we serve.

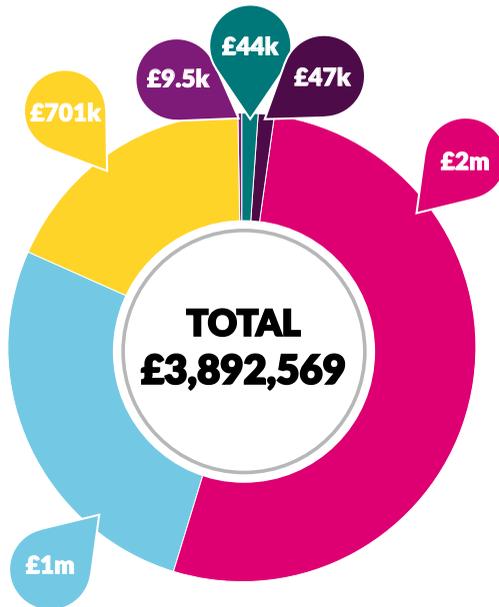
"They are an absolute pleasure to work with, and I would say any company looking to improve the way it gives grants or funds out to projects should get in touch with them."

financial overview



INCOME & ENDOWMENTS (£)

- Donations & Legacies
- Rental Income
- Investment Income
- Bank Interest



EXPENDITURE (£)

- Raising Funds
- Investment Management Costs
- Grants & Funding Contract
- Building Better Opportunities (European Social Fund & The National Lottery Community Fund)
- Support Costs
- Governance Costs

FOUNDATION FUNDS

Endowment Funds	12,316,828
Restricted Funds	5,739,218
Unrestricted General Funds	678,830
Unrestricted Designated Funds	888,529

NET ASSETS

Investments & Properties	12,959,602
Net Current Assets	6,663,803
Total Net Assets	19,623,405

Endowment Funds	Value at 31 March 2018 (£)	Value at 31 March 2019 (£)
Ambassadors Fund	87,817	90,188
Annie Bettman Fund	0	261,049
AXA Fund	207,422	210,918
Birmingham & Black Country Fund	365,248	353,582
Birmingham Mail Charity Fund	47,488	49,221
Building Better Lives Fund	968,977	2,368,970
Clarendon Court Sports Fund	6,927	7,044
Coventry Lord Mayor Fund	22,262	22,638
Coventry Nursing Fund	351,442	358,889
Deutsche Bank Grassroots Fund	132,167	136,990
Deeley 3 Peaks Fund	11,833	12,032
Forest of Arden Golf Club Captain's Fund	19,200	19,523
Friends Fund	17,747	18,922
Friends Provident Fund	12,185	12,391
George & Vera Bryan Grassroots Fund	185,737	192,515
Harry Payne Fund	2,573,567	2,759,426
Heart of England Fund	409,184	416,081
High Sheriff of Warwickshire Fund	144,291	153,830
James Kenning Fund	44,892	48,434
Jumping Through Hoops Fund	616,170	647,788
Kingscliffe Fund	169,910	172,774
Midlands Heart Fund	110,045	111,900
Mills & Reeve Grassroots Fund	61,796	64,051
Mike Holland Fund	0	93,607
National Grid Fund	72,924	74,153
Orbit Heart of England Fund	160,257	162,958
Property for Kids Grassroots Fund	24,306	25,193
PSA Peugeot Citroen Fund	360,449	366,525
Rolls Royce Fund	67,704	68,845
Sandwell Community Fund	0	266,519
Solihull Community Fund	220,014	237,375
Torrington House Fund	207,385	211,362
Trustees' New Deal Fund	36,233	41,492
Warwick Lying-in-Fund	40,202	41,442
Willenhall Community Fund	51,447	61,062
Youell Family Fund	2,141,174	2,177,140
Endowment Total Value	9,948,402	12,316,828

summary of funding

This table shows how much we awarded per fund during the year.

Funding Programme Name	No. of Awards 2018/19	Total Awarded 2018/19 (£)
#iwill BBCC	9	40,753.00
#iwill CSW	3	21,000.00
29th May 1961 Charitable Trust	20	11,500.00
29th May Small Grants	6	9,500.00
Axa Enterprise Fund - Grants	5	3,592.93
Axa Fund - Grants	1	760.00
BBCC Fund	36	50,596.31
Birmingham Sports Association	16	15,195.00
Building a Stronger Britain Together	6	185,973.00
Building Better Lives	5	47,264.00
Comic Relief Core Strength BBCC	11	41,339.64
Comic Relief Core Strength CSW	7	17,018.00
Communities Uncovered	3	22,764.00
Community Energy Warwickshire	9	11,595.00
Coventry Building Society Birmingham and Black Country	5	6,925.00
Coventry Building Society Coventry, Solihull and Warwickshire	18	29,648.64
Coventry Community Games	1	1,800.00
Coventry Nursing Fund Grants	4	6,233.00
CSW Fund	15	15,575.57
Deutsche Bank Small Grants	3	8,061.00
Drayton Manor Park	5	9,962.00
Federation of Petroleum Suppliers Surviving Winter Fund	4	11,594.00
Harry Payne Fund	103	93,800.00
Heart of England Cooperative Fund	74	33,587.40
James Kenning Fund Grant	2	2,410.07
Jumping through Hoops Hardship	48	19,532.68
Jumping Through Hoops Grants	6	57,044.00
Kingscliffe Fund Grants	1	3,000.00
Letitia & Charlene Education Award	1	6,159.00
Midland Heart Regeneration Fund - Grants	3	3,776.56
National Grid Fund - Grants	2	1,999.00
Nationwide Community Grants	21	734,115.00
Orbit Group Grants	2	1,800.00
Orbit Hardship Fund	145	43,557.38
Rolls Royce Grants	2	1,886.23
Royal London Foundation Fund	3	15,000.00
Solihull Community Fund	9	11,409.00
Surviving Winter Appeal	2	1,500.00
Tampon Tax Fund 2018	20	162,076.00
The Get Ready Fund	6	10,295.00
The John Saville Fund	5	17,000.00
The Mike Holland Fund	2	12,000.00
The Road to 2021 Fund	15	120,446.00
Torrington Fund Grants	2	2,200.00
Transformation and Growth Fund	2	29,500.00
Wesleyan Donor Directed	17	166,500.00
Wesleyan Large Grants	11	70,360.00
Wesleyan Small Grants BBCC	15	22,080.00
Wesleyan Small Grants CSW	12	20,000.00
Wesleyan Voting	9	57,751.00
Willenhall Community Fund	1	4,505.00
Youell Family Fund Grants	10	17,650.00
Young at Heart	4	3,358.69
Youth Social Action BBCC	9	34,277.00
Youth Social Action CSW	4	19,641.00
Grand Total	760	2,368,866.10

BBCC - Birmingham & Black Country Community Fund

CSW - Coventry, Solihull & Warwickshire Community Fund

partners & supporters



senior management team



Tina Costello
Chief Executive



Helen Kendrick
Senior Manager -
Operations



Claire Evans
Senior Manager -
Finance



Shamiela Ahmed
Senior Manager -
Operations

operations team



Jenny Whateley
Grants Officer



Liz Daw
Grants Officer



Sue Heyes
Grants Officer



Sarah Phillips
Executive Officer



Aaron Greaves
Marketing &
Communications Executive



Joanne Farr
Finance Officer



Lorna Langhorn
Grants Assistant



Natasha Bvute
Finance Officer

community matters team



Ben Slater
CM Partnership Manager



Sanjay Chand
CM Finance Officer



Robert Brydon
CM Database Officer



Hasmita Parmar
CM Partnership Officer



Paramjit Kaur
CM Finance &
Compliance Officer

presidents



**Rt. Reverend
Dr Christopher Cocksworth**
Bishop of Coventry



**Rt. Reverend
David Urquhart**
Bishop of Birmingham



Tim Cox
Lord Lieutenant of
Warwickshire



John Crabtree OBE
Lord Lieutenant of the
West Midlands

trustees



Phil Ewing
Chair



Lucie Byron



Sir Dominic Cadbury



Michelle Vincent



John Taylor



Sally Carrick



Amrik Bhabra



Jude Jennison



Paul Belfield



Chris West



Phil Pemble



Daniel Worthing



Liz McKenzie



Naeem Alvi

volunteers

Thank you to the volunteers and independent committee members who have supported us to award funding across the region this year. Including:

Afzal Hussain
Alan Crawford
Alison Orr
Amy Saunders
Anna Marie Keane
Beverley Thomas
Cheryl Flavell
Daniel Allen

Donald Payne
Duncan Cadbury
Emma Brodie
Fred Rattely
Helga Edstom
Ian Carey
Jessica Wilkes-Reading
Harjort Kalirai

Kate Hazelwood
Keith Sinfield
Kerry Amory
Lori Harvey
Martin Chuter
Michael Judge
Neil Yeomans
Pippa Reeve

Rachel Lancaster
Richard Mees
Robert King
Russell Bailey
Sharon Palmer
Sophie Tobin
Sue Howarth
Valerie Glazzard
Vera Ding

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kindly supported by:**



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