

# Annual Grant Making & Social Investment Report.

2017/18

Ellen Alcock  
Grants Manager

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## Introduction.

This report highlights key information about our grant making in 2017/18.

It's been another successful year for the Foundation. Alongside the increased amount of funding programmes, a number of exciting new partners have come on board to work with us.

Continuing our development in Birmingham and the Black Country, this year we secured a fantastic partnership with Wesleyan Assurance, which accounted for 20% (£311k) of our general grant making portfolio during the year. Managing the Wesleyan Foundation has enabled us to expand our work from regional to national, subcontracting grant making across the UK, working with partner Foundations in 8 different regions.

We're proud to be continuing this partnership in 2018 and hope to award £1m across the UK this year. To read more about The Wesleyan Foundation's impact please [click here](#).

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We were thrilled to support Coventry's bid to become UK City of Culture in 2021.

We awarded funding to three projects working across the city this year, each one helping to support the successful bid. Most notably, we awarded £10,000 to Positive Youth Foundation enabling them to develop the centrepiece for Coventry 2021, by hosting a youth orchestra, mixing talented young people from inner city areas with classical musicians to create a cultural fusion.

Our partnership with the Coventry 2021 Trust is also set to continue this year. We will be distributing further funding to support projects which will form part of the programme of events across Coventry in 2021.

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In the last twelve months we have been working hard to achieve the objectives set out in our 3-year strategic plan.

Key highlights from this year's report include:

- Over £2m awarded.
- 927 single awards made.
- 57% application success rate.
- 53 separate funds delivered.
- 3 new programmes managed.

In 2017, we began our Strategic Grant Making review to help shape a five-year plan to ensure our funding continues to be a relevant, credible and accessible. This work will continue this year following our consultation phase, we now have a task force working hard to implement changes and advise on the strategy.

I hope that you find this report useful and insightful.

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## Summary of Grant Making per Fund. - FIG: 1

| Funding Programme Name   | No of Awards 2017/18 | Total Spend 2017/18 (£) | No of Awards 2016/17 | Total Spend 2016/17 (£) |
|--|----------------------|-------------------------|----------------------|-------------------------|
| 29th May Flow Through Fund   | 19                   | 11,750.00               | 20                   | 12,000.00               |
| 29th May Small Grants Fund   | 1                    | 1,280.00                | 6                    | 8,446.00                |
| AXA Enterprise Fund  | 3                    | 4,649.00                | -                    | -                       |
| Band Hatton Button Fund  | 1                    | 2,000.00                | -                    | -                       |
| Birmingham & Black Country Fund  | 40                   | 60,756.00               | 8                    | 6,999.00                |
| Birmingham & Black Country Communities Together Fund   | -                    | -                       | 17                   | 76,501.00               |
| Birmingham Mail Charity Fund   | 1                    | 500.00                  | 7                    | 1,400.00                |
| Birmingham Sports Association Fund   | 8                    | 7,952.00                | -                    | -                       |
| Building Stronger Britain Together Fund  | 5                    | 122,026.00              | 5                    | 165,450.00              |
| Chamber of Commerce Presidents Fund  | 1                    | 1,994.00                | -                    | -                       |
| Comic Relief   | 94                   | 124,182.00              | 26                   | 79,240.00               |
| Community Energy Warwickshire Fund   | 4                    | 7,952.00                | 3                    | 4,320.00                |
| Coventry 2021 Fund   | 3                    | 25,000.00               | -                    | -                       |
| Coventry Building Society Fund   | 18                   | 25,629.00               | 32                   | 42,201.00               |
| Coventry Community Games Fund  | 1                    | 2,000.00                | 1                    | 1,500.00                |
| Coventry Lord Mayor Fund   | -                    | -                       | 2                    | 2,841.00                |
| Coventry Nursing Trust Fund  | -                    | -                       | 1                    | 2,296.00                |
| Deutsche Bank Fund   | 1                    | 5,000.00                | 4                    | 17,458.00               |
| 'Fourteen' - Spirit of 2012 Fund   | 26                   | 79,477.00               | 14                   | 75,395.00               |
| Harry Payne Trust Fund   | 118                  | 88,500.00               | 113                  | 92,560.00               |
| Harrison Beale Owen Fund   | 2                    | 3,993.00                | 1                    | 2,500.00                |
| Heart of England Cooperative Fund  | 107                  | 34,435.00               | 86                   | 28,849.00               |
| Heart of England Fund  | 21                   | 29,084.00               | 22                   | 23,573.00               |
| High Sheriff of Warwickshire Fund  | 9                    | 4,500.00                | 1                    | 1,500.00                |
| James Kenning Fund   | -                    | -                       | 1                    | 1,000.00                |
| John Saville Fund  | 6                    | 16,000.00               | 9                    | 14,175.00               |
| Jumping Through Hoops Fund   | 52                   | 113,044.00              | 19                   | 649,956.00              |
| Kingscliffe Fund   | 1                    | 4,800.00                | -                    | -                       |
| Love Leamington Fund   | 7                    | 9,500.00                | 10                   | 4,746.00                |
| Midland Heart Fund   | -                    | -                       | 1                    | 400.00                  |
| Mills & Reeves Fund  | -                    | -                       | 4                    | 2,440.00                |
| New Beginnings Fund  | -                    | -                       | 8                    | 75,857.00               |
| National Grid Fund   | 1                    | 660.00                  | -                    | -                       |
| Orbit Fund   | -                    | -                       | 1                    | 1,078.00                |
| Orbit Hardship Fund  | 197                  | 64,133.00               | 427                  | 89,140.00               |
| Peugeot Fund   | 6                    | 11,381.00               | 6                    | 7,500.00                |
| Positive Futures Fund  | 20                   | 91,714.00               | -                    | -                       |
| Rolls Royce Fund   | 1                    | 1,268.00                | -                    | -                       |
| Royal London Fund  | 1                    | 5,000.00                | 1                    | 4,000.00                |
| Solihull Community Trust Fund  | 6                    | 7,009.00                | 7                    | 8,837.00                |
| Sport Relief   | 1                    | 2,000.00                | 80                   | 81,094.00               |
| Surviving Winter Fund  | -                    | -                       | 8                    | 15,000.00               |
| Tame Valley Wetlands Fund  | -                    | -                       | 7                    | 6,256.00                |
| Tipton Education Fund  | 1                    | 2,000.00                | 8                    | 20,112.00               |
| Toms Fund  | -                    | -                       | 1                    | 4,000.00                |
| Torrington House Fund  | 3                    | 1,945.00                | 2                    | 2,000.00                |
| Warwickshire Recycling Fund  | -                    | -                       | 1                    | 2,000.00                |
| Wesleyan Foundation Fund   | 71                   | 311,045.00              | -                    | -                       |
| Women and Girls Fund   | 11                   | 145,000.00              | -                    | -                       |
| Youell Family Fund   | 23                   | 42,555.00               | 10                   | 13,400.00               |
| Young at Heart Fund  | 2                    | 3,180.00                | 33                   | 125,461.00              |
| Youth Social Action Fund   | 24                   | 106,381.00              | 1                    | 1,000.00                |
| <b>General grant-making Sub Total</b>  | <b>917</b>           | <b>1,581,274.00</b>     | <b>1,014</b>         | <b>1,774,481.00</b>     |
| *Big Lottery Fund & European Social Fund - Building Better Opportunities Community Matters Programme | 19                   | 522,762.00              | 20                   | 540,911.00              |
| <b>Portfolio Totals</b>  | <b>936</b>           | <b>2,099,168.00</b>     | <b>1,034</b>         | <b>2,315,392.00</b>     |

\*Fund not included in this report

## Decision Making.

The Foundation makes decisions to award funding in three main ways:

- a) **via a Foundation led independent sub-committee or panel**  
54% of the total amount distributed in the year was awarded by a Foundation led independent sub-committee or panel. This amounted to 35.4% of the number of individual grants.
- b) **via a donor led panel (administered by the Foundation)**  
22% of the total amount distributed in the year was awarded by a donor led panel. This amounted to 18.4% of the total number of individual grants.
- c) **as directed by a donor themselves (eg: donor asks for payment to be made).**  
24% of the total amount distributed in the year was awarded by a donor directly. This amounted to 46.2% of the number of individual grants.

FIG: 2

| 1) Foundation led sub-committee or panel               | Total Number of Grants | Total Amount Awarded (£) | % of Total Value (£) | % of Total Grants |
|--|------------------------|--------------------------|----------------------|-------------------|
| Birmingham & Black Country Grants Sub-Committee        | 72                     | 108,399.00               | 6.8                  | 7.6               |
| Coventry, Solihull & Warwickshire Grants Sub-Committee | 64                     | 97,424.00                | 6.1                  | 6.8               |
| Comic Relief Community Cash Panel                      | 77                     | 74,000.00                | 4.6                  | 8.2               |
| Comic Relief Core Strength Panel                       | 17                     | 50,182.00                | 3.1                  | 1.8               |
| Fourteen Spirit of 2012 Committee                      | 26                     | 79,477.00                | 5.0                  | 2.7               |
| Youth Social Action Panel                              | 24                     | 106,381.00               | 6.7                  | 2.5               |
| Jumping Through Hoops - Large Grants Panel             | 1                      | 27,410.00                | 1.7                  | 0.1               |
| Jumping Through Hoops - Small Grants Panel             | 14                     | 69,008.00                | 4.3                  | 1.5               |
| Love Leamington Fund Panel                             | 7                      | 9,500.00                 | 0.6                  | 7.4               |
| Sport Relief Community Cash Panel                      | 1                      | 2,000.00                 | 0.1                  | 0.1               |
| Women and Girls Fund Panel                             | 11                     | 145,000.00               | 9.1                  | 1.1               |
| <b>1) Totals</b>                                       | <b>314</b>             | <b>768,781.00</b>        | <b>48.1 %</b>        | <b>39.8 %</b>     |
| <b>Overall Portfolio Total</b>                         | <b>936</b>             | <b>1,581,274.00</b>      |                      |                   |

FIG: 3

| 2) Donor led panel              | Total Number of Grants | Total Amount Awarded (£) | % of Total Value (£) | % of Total Grants |
|---------------------------------|------------------------|--------------------------|----------------------|-------------------|
| Harry Payne Panel               | 118                    | 88,500.00                | 5.61                 | 13.0              |
| Peugeot Fund Panel              | 6                      | 11,381.00                | 0.72                 | 0.7               |
| Positive Futures Fund Panel     | 20                     | 91,714.00                | 5.82                 | 2.2               |
| Wesleyan Large Grants Committee | 23                     | 157,625.00               | 10.00                | 2.5               |
| <b>2) Totals</b>                | <b>167</b>             | <b>349,220.00</b>        | <b>22.15</b>         | <b>18.4</b>       |
| <b>Overall Portfolio Total</b>  | <b>936</b>             | <b>1,581,274.00</b>      |                      |                   |

## Success Rates.

Some of our funds are not open to applicants. This is because our donors choose the causes they want to support.

For those funds open to applications, we received 975 full applications in the year. This is an increase of 20% compared with the previous year.

552 were successful and 423 were unsuccessful. This gives us an overall success rate of 56.6% an increase of 1.4% on last year.

FIG: 4

Applicant Success Rate 2017/18

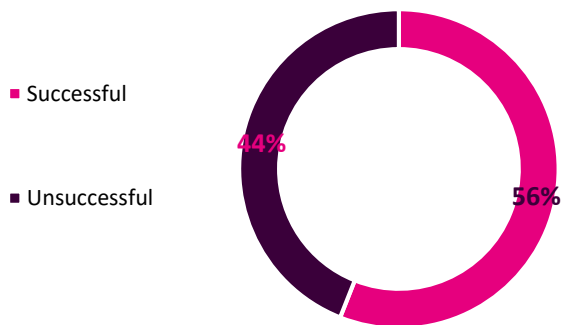
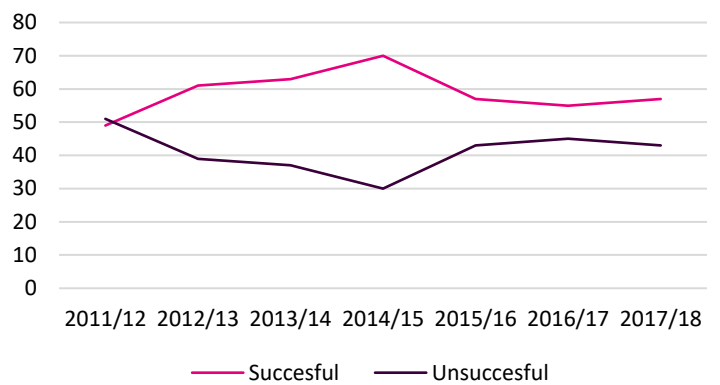


FIG: 5

Percentage of successful v. unsuccessful applications 2011 - 2018



## **New Programmes.**

A summary of our new grant programmes during the year is as follows:

### **The Wesleyan Foundation**

The fund aims to support charities and community groups that promote or improve health, education, innovation or social development in the UK.

There are two levels of grants available, Small Grants of up to £2,000, targeted at smaller organisations. Large Grants between £2,000 – £10,000, targeted at larger groups.

The success of the fund has led to the Wesleyan Foundation doubling in size for 2017/19.

### **Birmingham Sports Fund**

The fund aims to encourage sport participation in Birmingham. Projects are supported with grants of up to £1,000.

A range of groups have been supported from powerchair football and over 50s exercise classes, to Street dance and futsal. To date, more than 300 people have benefited from this funding so far.

### **Positive Futures**

The Foundation distributed £100k on behalf of a donor who wanted to support young people in Birmingham and across the Black Country.

The fund aims to help those who are at risk of becoming caught up in the criminal justice system.

20 groups have been funded to help make a difference across the region with projects ranging from mentoring, arts, employment support and youth clubs.

### **The Women and Girls Fund**

This grant funding is derived from the Tampon Tax and benefits women and girls. The Foundation has funded 11 groups for the next 3 years, giving them longer term support and stability to deliver important work.

### **Comic Relief – Core Strength**

The Foundation delivered the first round of a new programme for Comic Relief which supported the sector by providing £50k of core cost grants for smaller groups.

Funding covered general running costs (rent, electricity, rates etc) which is usually hard to obtain so provided a brilliant opportunity for groups.

## Geographic Distribution.

The following information describes the distribution of our funding geographically.

**FIG: 6**

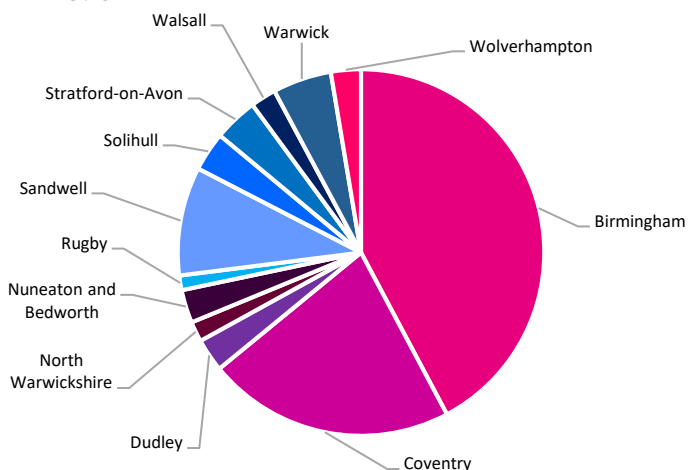
| Sub-regional Breakdown | Total Amount Awarded (£) | No. of Grants Awarded | % of total value (£) | % of total grants | Average Grant | Population       |
|------------------------|--------------------------|-----------------------|----------------------|-------------------|---------------|------------------|
| Birmingham             | 586,483.00               | 244                   | 37.0                 | 26.8              | 2404          | 1,111,307        |
| Black Country          | 243,745.00               | 92                    | 15.4                 | 10.0              | 2649          | 1,178,008        |
| Coventry               | 218,623.00               | 71                    | 13.8                 | 7.7               | 3079          | 347,650          |
| Warwickshire           | 203,791.00               | 72                    | 12.8                 | 7.8               | 2830          | 556,701          |
| Solihull               | 48,285.00                | 25                    | 3.0                  | 2.7               | 1931          | 212,969          |
| Other *                | 280,347.00               | 413                   | 17.7                 | 45.0              | 678           | n/a              |
| <b>Totals</b>          | <b>1,581,274.00</b>      | <b>917</b>            | <b>100</b>           | <b>100</b>        | <b>1,724</b>  | <b>3,406,635</b> |

**FIG: 7**

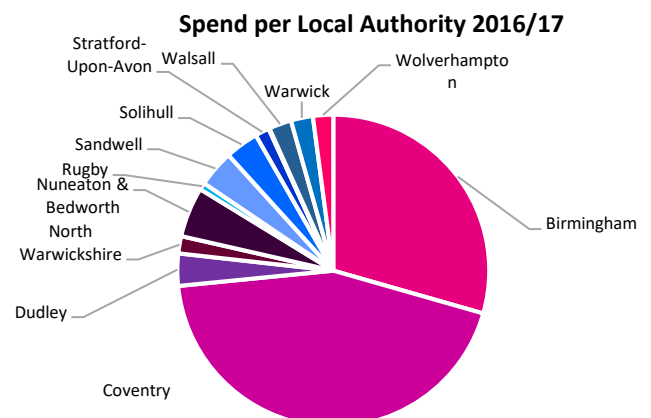
| Local Authority Breakdown | Total Amount Awarded (£) | No. of Grants Awarded | % of total value (£) | % of total grants | Average Grant | Population       |
|---------------------------|--------------------------|-----------------------|----------------------|-------------------|---------------|------------------|
| Birmingham                | 586,483.00               | 244                   | 37.2                 | 26.6              | 2,404         | 1,111,307        |
| Coventry                  | 218,623.00               | 71                    | 13.9                 | 8.8               | 2,649         | 347,650          |
| Dudley                    | 40,945.00                | 18                    | 2.6                  | 1.9               | 2,275         | 318,358          |
| North Warwickshire        | 24,957.00                | 13                    | 1.6                  | 1.4               | 1,920         | 62,849           |
| Nuneaton and Bedworth     | 40,924.00                | 15                    | 2.8                  | 1.7               | 2,728         | 126,944          |
| Rugby                     | 18,000.00                | 5                     | 1.1                  | 0.6               | 3,600         | 104,544          |
| Sandwell                  | 134,206.00               | 31                    | 8.6                  | 3.4               | 4,329         | 324,587          |
| Solihull                  | 48,285.00                | 25                    | 3.1                  | 2.7               | 1,931         | 212,969          |
| Stratford-on-Avon         | 54,370.00                | 15                    | 3.4                  | 1.7               | 3,625         | 121,288          |
| Walsall                   | 31,589.00                | 27                    | 2.0                  | 2.9               | 1,170         | 278,902          |
| Warwick                   | 65,540.00                | 24                    | 4.1                  | 2.6               | 2,731         | 141,076          |
| Wolverhampton             | 37,005.00                | 16                    | 2.3                  | 1.7               | 2,313         | 256,161          |
| Other *                   | 280,347.00               | 413                   | 17.7                 | 45                | 678           | n/a              |
| <b>Totals</b>             | <b>1,581,274.00</b>      | <b>917</b>            | <b>100</b>           | <b>100</b>        | <b>1,724</b>  | <b>3,406,635</b> |

\*Other represents grant making which has occurred outside of the West Midlands and where the fund is not monitored due to the nature of the agreement with our donor. This specifically relates to funds such as: Orbit Hardship Fund and Heart of England Cooperative Fund.

**FIG: 8** Spend per Local Authority Area 2017/18



**FIG: 9**





## Primary Project Themes.

The following information describes the distribution of our funding.

**FIG: 10**

| Theme  | Total Amount Awarded (£) | No. of Grants Awarded | % of total value (£) | % of total grants | Average Grant |
|--|--------------------------|-----------------------|----------------------|-------------------|---------------|
| Anti-social behaviour                                  | 24,896.00                | 9                     | 1.57                 | 0.98              | 2766          |
| Arts, culture and heritage                             | 86,752.00                | 28                    | 5.49                 | 3.05              | 3098          |
| Building skills and improving access to employment     | 43,550.00                | 13                    | 2.75                 | 1.42              | 3355          |
| Bullying   | 1,268.00                 | 1                     | 0.08                 | 0.11              | 1268          |
| Caring responsibilities                                | 25,085.00                | 10                    | 1.59                 | 1.09              | 2509          |
| Counselling/Advice/Mentoring                           | 87,899.00                | 25                    | 5.56                 | 2.73              | 3516          |
| Crime and safety                                       | 30,962.00                | 8                     | 1.96                 | 0.87              | 3870          |
| Disability and Access issues                           | 102,863.00               | 44                    | 6.51                 | 4.80              | 2337          |
| Domestic violence                                      | 48,752.00                | 5                     | 3.08                 | 0.55              | 9750          |
| Economy  | 2,000.00                 | 1                     | 0.13                 | 0.11              | 2000          |
| Education, learning and training                       | 143,920.00               | 42                    | 9.10                 | 4.58              | 3427          |
| Emergency/Rescue services                              | 5,000.00                 | 1                     | 0.32                 | 0.11              | 5000          |
| Employment and Labour                                  | 9,753.00                 | 6                     | 0.62                 | 0.65              | 1626          |
| Environment and improving surroundings                 | 15,413.00                | 11                    | 0.97                 | 1.20              | 1401          |
| Financial exclusion and financial illiteracy           | 14,920.00                | 3                     | 0.94                 | 0.33              | 4973          |
| Gangs  | 5,977.00                 | 2                     | 0.38                 | 0.22              | 2988          |
| Health, wellbeing and serious illness                  | 151,462.00               | 77                    | 9.58                 | 8.40              | 1967          |
| Homelessness   | 47,773.00                | 10                    | 3.02                 | 1.09              | 4777          |
| Isolation  | 9,380.00                 | 4                     | 0.59                 | 0.44              | 2345          |
| IT / Technology  | 2,432.00                 | 3                     | 0.15                 | 0.33              | 811           |
| Language, culture and racial integration               | 4,236.00                 | 1                     | 0.27                 | 0.11              | 4236          |
| Mental health  | 75,200.00                | 29                    | 4.76                 | 3.16              | 2593          |
| Offending/At risk of offending                         | 20,439.00                | 4                     | 1.29                 | 0.44              | 5110          |
| Poverty and disadvantage                               | 70,243.00                | 31                    | 4.44                 | 3.38              | 2266          |
| Reducing isolation                                     | 21,052.00                | 12                    | 1.33                 | 1.31              | 1754          |
| Refugees/Asylum/Immigration                            | 13,847.00                | 7                     | 0.88                 | 0.76              | 1978          |
| Renewable energies and recycling                       | 3,952.00                 | 2                     | 0.25                 | 0.22              | 1976          |
| Sexual abuse   | 1,000.00                 | 1                     | 0.06                 | 0.11              | 1000          |
| Social inclusion and fairness                          | 50,361.00                | 31                    | 3.18                 | 3.38              | 1625          |
| Sport and Recreation                                   | 44,038.00                | 32                    | 2.78                 | 3.49              | 1376          |
| Stigma/Discrimination                                  | 2,000.00                 | 2                     | 0.13                 | 0.22              | 1000          |
| Stronger communities/Community support and development | 229,676.00               | 71                    | 14.52                | 7.74              | 3235          |
| Substance abuse and addiction                          | 22,700.00                | 5                     | 1.44                 | 0.55              | 4540          |
| Supporting family life                                 | 31,029.00                | 17                    | 1.96                 | 1.85              | 1825          |
| No Data***   | 131,444.00               | 369                   | 8.31                 | 40.24             | 356           |
| <b>Totals</b>  | <b>1,581,274.00</b>      | <b>917</b>            | <b>100</b>           | <b>100</b>        | <b>1724</b>   |

= Top 5 primary project themes

## Breakdown by Age.

FIG: 11

| Ages                   | Total Amount Awarded (£) | Number of Applications Awarded | % of value | % of total grants | Average Grant |
|------------------------|--------------------------|--------------------------------|------------|-------------------|---------------|
| Adults (26 – 65)       | 290,595.00               | 112                            | 18.38      | 12.21             | 2595          |
| All Ages               | 264,096.00               | 118                            | 16.70      | 12.87             | 2238          |
| Children (5 – 12)      | 135,065.00               | 66                             | 8.54       | 7.20              | 2046          |
| Early Years (0 – 4)    | 24,433.00                | 17                             | 1.55       | 1.85              | 1437          |
| Seniors (65+)          | 101,354.00               | 71                             | 6.41       | 7.74              | 1428          |
| Young Adults (19 – 25) | 257,737.00               | 49                             | 16.30      | 5.34              | 5260          |
| Young People (13 – 18) | 376,550.00               | 115                            | 23.81      | 12.54             | 3274          |
| No Data***             | 131,444.00               | 369                            | 8.31       | 40.24             | 356           |
| <b>Total</b>           | <b>1,581,274.00</b>      | <b>917</b>                     | <b>100</b> | <b>100</b>        | <b>1724</b>   |

## Breakdown by Ethnicity.

FIG: 12

| Beneficiary Ethnicity        | Total Amount Awarded (£) | Number of Applications | % of total value | % of total grants | Average Grant |
|------------------------------|--------------------------|------------------------|------------------|-------------------|---------------|
| African                      | 31,453.00                | 9                      | 1.99             | 0.98              | 3495          |
| Asian and Asian British      | 32,456.00                | 15                     | 2.05             | 1.64              | 2164          |
| Asian and White              | 3000.00                  | 3                      | 0.19             | 0.33              | 1000          |
| Bangladeshi                  | 3500.00                  | 3                      | 0.22             | 0.33              | 1167          |
| Black and Black British      | 13,527.00                | 6                      | 0.86             | 0.65              | 2255          |
| Black Caribbean and White    | 12,079.00                | 4                      | 0.76             | 0.44              | 3020          |
| Caribbean                    | 9499.00                  | 6                      | 0.60             | 0.65              | 1583          |
| Pakistani                    | 7886.00                  | 4                      | 0.50             | 0.44              | 1972          |
| White British                | 235,822.00               | 98                     | 14.91            | 10.69             | 2406          |
| White East European          | 4000.00                  | 2                      | 0.25             | 0.22              | 2000          |
| Multiple Ethnicities         | 1,073,108.00             | 393                    | 67.86            | 42.86             | 2731          |
| White Gypsies and Travellers | 3000.00                  | 2                      | 0.19             | 0.22              | 1500          |
| White Irish                  | 20,500.00                | 3                      | 1.30             | 0.33              | 6833          |
| No Data***                   | 131,444.00               | 369                    | 8.31             | 40.24             | 356           |
| <b>Totals</b>                | <b>1,581,274.00</b>      | <b>917</b>             | <b>100.00</b>    | <b>100.00</b>     | <b>1724</b>   |



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