



# Grant Making Report 2015/16

Heart of England Community Foundation

April 2016



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Heart of England Community Foundation is a registered charity (1117345) and Company Limited by Guarantee (5999452). The aims and objectives of the Foundation is the promotion of any charitable purposes for the benefit of the community in the city of Coventry, the county of Warwickshire , Birmingham and the Black Country and elsewhere in the United Kingdom ("area of benefit") and in particular the advancement of education the protection of good health both mental and physical and the relief of poverty and sickness, other exclusively charitable purposes which are in the opinion of the Trustees beneficial to the community in the area of benefit.

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Data Source: Salesforce > Heart of England CF

For further information about the work of the Foundation please visit [www.heartofenglandcf.co.uk](http://www.heartofenglandcf.co.uk)

Our Foundation is a member of UK Community Foundations, the umbrella body for Community Foundations in the United Kingdom, which provide s advice and support to its member community foundations and helps UK-wide clients such as Big Lottery and Comic Relief channel funding, via community foundations, to where it's needed most.

HoECF is a Charities Commission Level 2 endorsed, accredited member of this network.





(L-R) Tina Costello, Kevin Jones, Brian Holt, Paul Belfield

## Introduction

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Heart of England Community Foundation is a charity based in Coventry working across the County of the West Midlands & Warwickshire.

**“We seek money from people who want to make an **IMPACT** and we award it to community and voluntary groups **WHO NEED IT.**”**

The Foundation offers a range of philanthropic services to supporters and donors who want to help their communities through the giving of donations and grants. We work with individuals, businesses and other trusts & foundations to support their philanthropic ambitions by developing and delivering a range of unique grants programmes and channels of charitable giving that meet identified needs.

Community organisations from across Birmingham, the Black Country, Coventry, Solihull & Warwickshire benefit by applying to us to deliver projects and services at the very grass roots of our communities.

This report showcases all of our charitable giving over the past year and gives a broad overview of the programmes we have managed, grants we have awarded and the people & communities that have benefited from our grants.

We hope that this report gives you a real sense of the scale and size of the Foundation’s work and provides insight into the types of activities we fund and the people and places that we help.

If you would like to find out more information about applying for a grant please call (024) 7688 3262.

Alternatively if you would like to speak with me about setting up a fund, a programme or donating to the Foundation you can contact me at [tina@heartofenglandcf.co.uk](mailto:tina@heartofenglandcf.co.uk) or by calling me on (024) 7688 3260.

**Tina Costello**  
Chief Executive

## Summary of Grants Awarded

Funding Programme Name	2015-2016		No of Awards 2014/15	Total Spend 2014/15 (£)
	No of Awards 2015/16	Total Spend 2015/16 (£)		
29th May Flow Through	20	12,000.00	20	12,000.00
29th May Small Grants	5	6,250.00	2	2,500.00
Arthur J Gallagher Fund	1	700.00	-	-
AXA	-	-	1	298.26
AXA Enterprise	1	1,600.00	2	2,735.72
Band Hatton Button	-	-	3	4,262.00
Chamber of Commerce Presidents	2	2,350.00	1	180.00
Comic Relief	53	220,080.56	35	222,850.21
Community Energy Warwickshire	4	4,460.00	5	4,061.40
Coventry Building Society	18	25,764.82	26	35,810.59
Coventry Community Games	2	1,600.00	5	4,996.00
Coventry Lord Mayor	1	992.15	10	9,793.49
Coventry Nursing Trust	3	5,197.00	3	4,375.00
European Social Fund (ESF)	-	-	142	1,774,473.02
Federation of Petroleum Suppliers	-	-	2	200.00
Forest of Arden	-	-	1	156.49
'Fourteen' - Spirit of 2012	11	50,128.00	-	-
Harry Payne Trust	124	93,514.00	-	-
Heart of England Cooperative	92	32,630.00	107	28,430.00
Heart of England Fund	32	44,143.99	13	17,705.71
High Sheriff of Warwickshire	2	3,000.00	1	2,000.00
Jaguar Fund	-	-	6	5,400.00
James Kenning	1	1,000.00	1	1,881.20
John Saville Fund	4	8,000.00	-	-
Kingscliffe Fund	-	-	1	1,000.00
Love Leamington	6	2,990.00	-	-
Midland Heart	1	400.00	1	895.18
National Grid	2	708.00	1	593.21
Newsome Vaughan	-	-	1	245.21
Orbit Fund	2	1,050.00	1	1,303.64
Orbit Hardship Fund	306	96,420.79	336	73,990.03
Peugeot Fund	4	7,005.40	2	2,334.00
Positive Futures Fund	19	88,433.53	-	-
Property Group	1	1,460.00	-	-
Red Nose Day	107	100,000.00	-	-
Rolls Royce Fund	-	-	2	1,376.13
Solihull Community Trust	8	7,020.90	9	11,628.00
Sport Relief	-	-	53	51,310.00
Surviving Winter	7	6,916.00	2	1,810.00
Tame Valley Wetlands Fund	8	8,056.00	-	-
Toms Fund	-	-	6	31,399.00
Torrington House	2	3,500.00	1	500.00
Warwickshire Recycling	4	5,100.00	7	6,974.66
Willenhall Community Trust	1	1,980.00	-	-
Youell Family Fund	9	9,800.00	7	21,705.00
<b>Totals</b>	<b>863</b>	<b>854,251.14</b>	<b>816</b>	<b>2,341,173.15</b>

## Summary Breakdown

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The Summary of Grants Awarded shows that the Foundation had a **↓63%** decrease in the total amount of funding spent between 2015 and 2016. This is in contrast to the overall increase of **↑6%** that was made in the amount of individual awards that have been made.

Factors for the decrease in funding distributed include the lack of European Social Funding (ESF) over the period. In 2014/15 our ESF contract represented 76% of all funding and hence we have seen a large statistical shift this year.

We have also not been able to distribute on behalf of 11 funds this year which awarded grants previously. To counter this we have brought 8 new funds into our portfolio as seen in the table on page 4.

Additionally the data represents a **↑21% increase** since 2013 in the number of individual awards made, increasing from **712** in 2013/14 to **863** in 2015/16; an overall rise of 151 grants.

The Foundation distributed 0.1% statutory funding in the year; this funding came from the Coventry Community Games Fund. We believe that this statistic heavily reflects the 'state of play' within the voluntary sector over the past number of years as local authorities and central government continues its restructuring and prioritisation which includes a reduced amount of statutory funding and programmes.

In total **719 applications** were received via open calls. The overall success rate for general grant funding was **57%** last year, a decrease of **↓18.5%** on the previous year. This is again reflective of the competition for funding currently within the local sector. As funders we are keen to focus our limited resources most effectively to meet targeted and identified needs and this has increased the level of competitiveness for our grants.

'Open call' application figures do not take into account any applications which have been awarded via donor directed funds. We continue to encourage groups to contact us before submitting an application to ensure eligibility and avoid disappointment and this works well in ensuring that applications are good quality.

Diagram 1

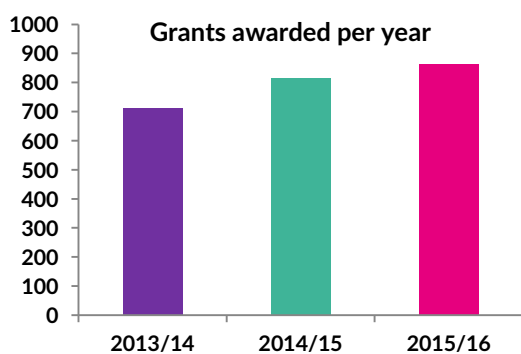
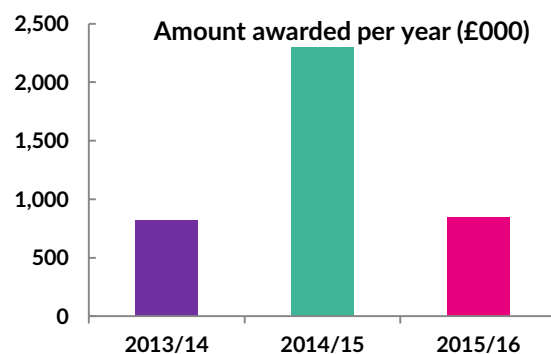


Diagram 2



## Grant Making Decisions

73% of funding distributed by the Foundation last year was awarded by one of the following independent panels:

Panel Name	Number of Grants	Amount Awarded	% of Total Awarded
Grants Sub Committee (Coventry, Solihull & Warwickshire)	124	185,765.29	21.7
Grants Sub Committee (Birmingham & the Black Country)	139	186,554.48	21.8
Fourteen - Spirit of 2012 Local Reference Group Panel	11	50,128.00	5.9
Harry Payne Trust Panel	124	93,514.00	10.9
Love Leamington Panel	6	2,990.00	0.4
Peugeot Panel	4	7,005.40	0.8
Positive Futures Panel	19	88,433.53	10.4
Tame Valley Wetlands Panel	8	8,056.00	0.9

The remaining 27% of our funding was distributed in a number of other ways; primarily directed by the donor.

For example the Orbit Hardship Fund is designed to support families and individuals that live in Orbit properties across the UK. We support these clients individually with white goods, recycled furniture, carpets and other goods/services in conjunction with Orbit staff who approve these applications.

The average panel grant last year was worth **£1,431** whereas our average donor directed grant was £519. This proves to us the value of having a healthy portfolio of funds available for communities.

Diagram 3

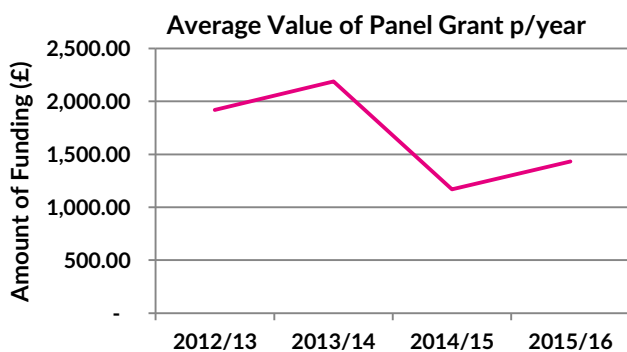
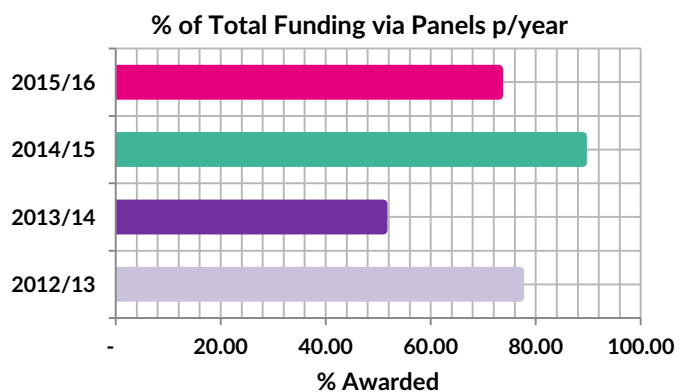


Diagram 4



## New Programmes

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The Foundation has continued to diversify its portfolio of grant making programmes and donor directed funds. A summary of our newest programme funds can be found here:

### ♥ 'Fourteen' - Spirit of 2012

Fourteen is a new grants programme from The Spirit of 2012 Trust, an independent charity, established with a £47m endowment from the Big Lottery Fund as a legacy of the 2012 London Olympic Games. The three tier grants programme offers a range of different sizes of community investment some of which has been managed by the Foundation to bring about positive impact within the Kingstanding area of Birmingham. Outcomes for the area include improved wellbeing, improved perceptions towards disability and impairment, overcoming isolation and connecting communities.

### ♥ Harry Payne Trust

The Harry Payne Fund was founded in 1939 by Harry Payne, a Birmingham businessman. After 75 years as an independent grant giving Trust the trustees decided that its future was better protected for longer term benefit in the hands of the Foundation. The fund supports a diverse range of community initiatives and activities within a 25 mile radius of Birmingham City Centre.

### ♥ Love Leamington

Love Leamington Fund has been created through a partnership with Chris White MP. The fund is made up of donations from the MP as well as local businesses in the Town. Funding raised is then distributed to small voluntary groups in Leamington.

### ♥ Positive Futures Fund

The focus of the Positive Futures Fund was to support community/voluntary organisations and charities working with disadvantaged young people in Birmingham and the Black Country to deliver innovative ways that inspire and keep young people out of the criminal justice system (and those at risk of falling into the criminal justice system).

### ♥ Tame Valley Wetlands Fund

The Tame Valley Wetlands is a landscape partnership scheme, led by Warwickshire Wildlife Trust and supported by the Heritage Lottery Fund. The partnership is made out of 18 different organisations, with Warwickshire Wildlife Trust as the lead partner. It aims to create a wetland landscape, rich in wildlife and accessible to all in the vicinity of the River Tame between Coleshill and Tamworth. Grants from this programme are up to £2,000 which must be match funded and designed to complement the wider activities being delivered within the programme.

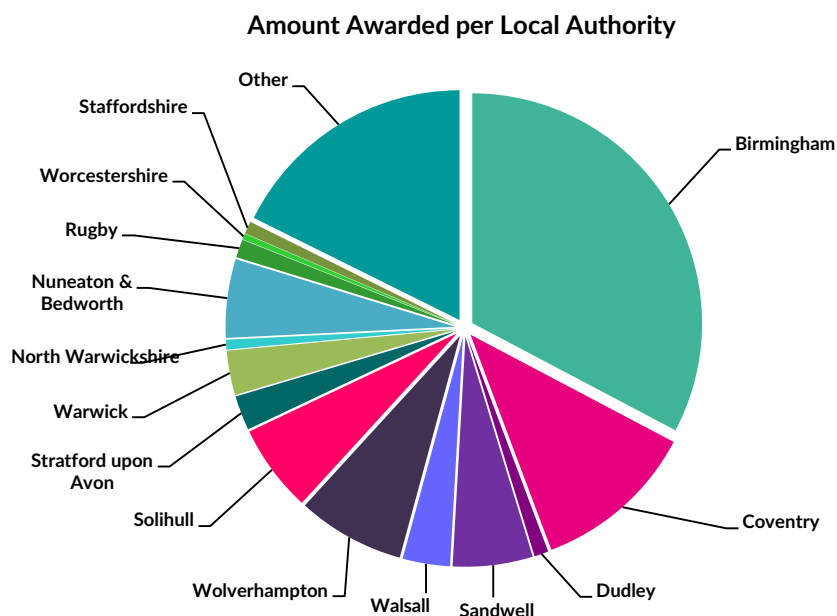
## Geographical Distribution

LA Area	Amount Awarded 2015/16 (£)	Total Grants Awarded 2015/16	Population	% of total value	% of total grants
Birmingham	279,548.91	162	1,092,330	32.7	18.8
Coventry	98,661.56	64	329,810	11.5	7.4
Dudley	8,532.00	8	312,925	1.0	0.9
North Warwickshire	5,895.80	4	62,014	0.7	0.5
Nuneaton & Bedworth	47,295.00	17	125,400	5.5	2.0
Rugby	10,968.00	4	100,500	1.3	0.5
Sandwell	48,041.70	36	314,300	5.6	4.2
Solihull	52,769.90	27	206,700	6.2	3.1
Staffordshire	7,551.00	6	849,600	0.9	0.7
Stratford upon Avon	20,802.08	12	120,800	2.4	1.4
Walsall	28,434.00	22	269,300	3.3	2.5
Warwick	26,693.00	24	137,700	3.1	2.8
Wolverhampton	64,658.40	30	249,470	7.6	3.5
Worcestershire	3,500.00	6	566,500	0.4	0.7
Other*	150,899.79	441	n/a	17.7	51.1
<b>Totals</b>	<b>854,251.14</b>	<b>863</b>		<b>100</b>	<b>100</b>

The Foundation has continued to grow its geographical presence this year. The table above represents where the majority of our grant funding have been distributed. New funds including Harry Payne and Tame Valley Wetlands have contributed to the Foundation awarding grants across areas such as South Staffordshire and Worcestershire.

A high proportion of our Birmingham grants came from the Red Nose Day Community Cash programme. Grants from this programme were worth a maximum of £1000 and the total programme value was £100,000, all for Birmingham and the Black Country.

\* 'Other' represents grants where no meaningful statistical data can be gathered mostly due to the nature of the way the grant has been funded such as directed by the donor. (For example: Orbit Hardship Fund)





## Project Themes

Primary Project Themes	2015/2016		% of Total Funds 2014/15
	Amount Awarded 2015/16	% of Total Funds 2015/16	
Anti-Social Behaviour	31,857.40	3.73	-
Arts, Culture & Heritage	15,073.00	1.76	1.9
Bullying	9,445.00	1.11	-
Caring Responsibilities	2,500.00	0.29	-
Community Support & Development	151,610.90	17.75	3.3
Counselling / Advice / Mentoring	13,522.30	1.58	0.8
Crime & Safety	39,609.00	4.64	-
Disability & Access Issues	28,557.50	3.34	0.5
Education & Training	71,011.40	8.31	1.7
Employment & Labour	42,918.00	5.02	76.0
Environment & Recycling	21,279.80	2.49	0.5
Health & Wellbeing	82,822.60	9.70	2.6
Housing & Homelessness	129,551.30	15.17	3.4
IT & Technology	6,366.59	0.75	0.3
Mental Health	7,470.00	0.87	-
Poverty & Disadvantage	36,456.00	4.27	0.7
Racial and Cultural Integration	12,717.00	1.49	0.5
Refugees / Asylum / Immigration	3,799.00	0.44	-
Religion	-	-	0.3
Social Enterprise	-	-	0.2
Social Inclusion	44,695.60	5.23	2.6
Sport and Recreation	74,472.00	8.72	3.2
Substance Misuse & Addiction	10,512.65	1.23	-
Supporting Family Life	11,054.10	1.29	0.9
Transport Issues	2,533.00	0.30	0.2
Violence & Exploitation	3,165.00	0.37	-
Volunteering	1,252.00	0.15	0.3
<b>Totals</b>	<b>854,251.14</b>	<b>100</b>	<b>100</b>

The table above represents projects funded, categorised by primary activity theme. Many of the projects we fund meet more than one of the themes and hence we take the primary data that most reflects the projects activities. This enables us to report more tangible data about the types of projects that we support.

We have seen the amount of funding for projects tackling unemployment has dropped, again due to the closure of our ESF programme. This year has seen a huge rise in the amount of projects focused on community support and development.

Top 5 Primary Project Themes 2015/16		Top 5 Primary Project Themes 2014/15	
1	Community Support & Development	Employment & Labour	1
2	Housing & Homelessness	Housing & Homelessness	2
3	Health & Wellbeing	Community Support & Development	3
4	Sport and Recreation	Sport & Recreation	4
5	Education & Training	Health & Wellbeing	5

## Project Beneficiaries

### Breakdown by Age

The table below reflects the primary age groups of the beneficiaries of our grant funding.

Primary Beneficiary Age Groups	2015/2016		% of Total Funds 2014/15
	Amount Awarded 2015/16	% of Total Funds 2015/16	
Early Years (0 - 4)	18,504.24	2.2	0.9
Children (5 - 12)	99,231.68	11.6	4.1
Young People (13 - 18)	330,089.70	38.6	3.5
Young Adults (19 - 25)	55,990.74	6.6	4.6
Adults (26 - 65)	175,748.94	20.6	82
Seniors (65 +)	89,246.33	10.4	2.8
All Ages	85,439.51	10	1.9
<b>Totals</b>	<b>854,251.14</b>	<b>100</b>	<b>100</b>

Again this table reflects 'primary' data – which is the most accurate analysis of projects outputs. We can see that across all ages other than 'adults' there have been increases in funding, the highest of these increase was for young people at over 1000%.

One of the main reasons for the decrease in funding for adults was the closure of our ESF programme. The ESF programme only supported adults of working age. Although a reduction can be seen from the previous year, adults still received the second most funding of all demographics this year.

### Breakdown by Ethnicity

A general breakdown of Black, Asian and Ethnic Minority population across the region is as follows:

Local Authority Area	Percentage
Birmingham	43%
Coventry	26%
Dudley	12%
North Warwickshire	7%
Nuneaton & Bedworth	10%
Rugby	13%
Sandwell	23%
Solihull	14%
Staffordshire	4%
Stratford upon Avon	10%
Walsall	23%
Warwick	15%
Wolverhampton	36%
Worcestershire	8%

Primary Beneficiary Ethnicity	2015/2016		% of Total Funds 2014/15
	Amount Awarded 2015/16 (£)	% of Total Funds 2015/16	
African	6,813.00	0.80	0.35
All Ethnicities	417,233.18	48.8	71
Asian & White	36,106.00	4.23	1.7
Bangladeshi	-	-	0.32
Black Caribbean & White	32,143.17	3.76	1
British	288,269.79	33.7	23
Caribbean	14,402.00	1.69	0.22
Eastern European	8,700.00	1.02	-
Gypsies & Travellers	5,779.00	0.68	-
Indian	-	-	0.84
Irish	1,396.00	0.16	0.04
Mixed	1,396.00	0.16	-
Pakistani	2,792.00	0.33	0.6
Other*	39,221.00	4.59	1
<b>Totals</b>	<b>854,251.14</b>	<b>100</b>	<b>100</b>

The table above shows that beneficiaries of our projects cover a wide range of ethnicities. Many of the projects we support are outreaching and engage with a wide range of people from multiple backgrounds and this is represented by almost 49% of funding being distributed to projects working with 'All Ethnicities'. This year we have also funded projects working with Gypsies and Traveller and Eastern European communities.

\* 'Other' represents grants where no meaningful statistical data can be gathered mostly due to the nature of the way the grant has been funded such as directed by the donor. (For example: Orbit Hardship Fund)

## Concluding Statement

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The Foundation continues to support a very diverse proportion of communities' right across the West Midlands region. Our report summarises the primary support we have given throughout the year, and it is crucial that we continue to develop existing and new philanthropy to ensure that our reach and diversity grows.

We understand that the need for what we offer is ever increasing. Due to public sector service restructures and a lack of central government intervention, communities and especially the voluntary and community sector will be called upon to respond to new challenges moving forward.

Our role will be to enable and help the sector to emerge stronger and better prepared for the future and we will continue to provide crucial finance to grassroots activities and initiatives; paramount to the sustainability of our communities and the people within them.

We are shortly due to announce the launch of a new funding programme for Coventry called Jumping Through Hoops. This programme will enable VCSE organisations to support young adults to grow by developing opportunities and enabling prosperity. We intend to support people in the city aged 18-30 with over £1M over the next five years.

We will continually seek to develop new funding initiatives similar to Jumping Through Hoops and grow local philanthropy across our whole geography. We will also strengthen our grant making continually to ensure it remains fit for purpose, future proof and ultimately that it is making a difference, locally.

**Ryan Boyce**  
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