

# our annual review 2017/18



Front Cover Image:  
Cape Community Day Centre, Birmingham

Heart of England Community Foundation is an accredited member of UK Community Foundations, the national umbrella body for Community Foundations in the UK.



UK COMMUNITY  
FOUNDATIONS

MEMBER

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## about us

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

Working with our donors, we award funding to community projects supporting children, adults, older people and people living with disabilities to take part in initiatives promoting community cohesion, education, sports, health and everything in between.

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

Working with the likes of Wesleyan Assurance, Coventry Building Society, Orbit Group, Peugeot and Drayton Manor, we have a dedicated team of donors who are passionate about making the communities on their doorstep, better places for everyone.

The projects we support rely on us because they often fall below the radar of national funders and we provide a vital lifeline to help them become sustainable.

The Foundation was established on Valentine's Day 1995 and in that year, we awarded just £2,000 in funding. Since then we've distributed over £15 million benefiting an estimated 2 million people across the region.

# foreword

**I was delighted to be invited to take on a presidential role at Heart of England Community Foundation.**



This Annual Review discloses just the surface of what has been achieved by the Foundation over the last financial year. The number of people who have benefited through partnerships with generous donors and community organisations is an inspiring achievement. The grants awarded by the Foundation often provide the catalyst which enables individuals and communities to thrive.

Reading this review, you will inevitably be moved by many of these stories. You will readily see the difference that has been made by even the smallest awards. Through investing in both the people and organisations that work at the very heart of our communities, the Foundation has shown us that a little can go a very long way.

A hidden part of the Foundation's work is being able to connect business and professional leaders and philanthropists to their local communities, so I do hope you will find this Annual Review both informative and enjoyable.

**John Crabtree, OBE**  
**Lord Lieutenant of the West Midlands**

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# welcome

from our Chairman & Chief Executive

## Inspirational...

**That's exactly what the last year has been for everyone involved with the Foundation. Thanks to our amazing donors and funders we've been able to continue supporting a wide range of fantastic and thoroughly rewarding projects across the region and further afield.**

It doesn't feel like twelve months since we last met to review our key achievements, yet here we are, reflecting on another successful year.

We feel very fortunate to lead a charity experiencing steady continual growth, securing new donors and developing new relationships across the West Midlands.

Without our dedicated staff team, ably supported by very willing and diverse trustees and volunteers, our ambitions would not continue to be realised. This year we have continued to develop our knowledge and expertise across the region, ensuring that support is given where it's really needed.

This year we have implemented our new 3-year strategic plan and delivered on two key priorities: Firstly, to undertake an extensive consultation with a wide range of stakeholders on our current grant making. Following on from the consultation we've now established a Funding Review Task Force; responsible for developing and setting a strategy on the future of our grant making.

Secondly, we commissioned The University of Wolverhampton to undertake extensive research about the key challenges facing communities in Birmingham and the Black Country resulting in our Communities Uncovered Report.

This report provides us with the intelligence and knowledge to direct our grant making where it is most needed. However, we have limited funds to address the key recommendations in this report and we are actively looking for new donors to support our Communities Uncovered Grant Programme. A copy of the report can be downloaded from our website.

Our strategic plan sets down a challenge of increasing our endowment to £20 million by 2020 – a clear sign of our ambition.

You can help us to achieve this. If you know of any charitable trusts that are dormant or struggling to administer their funding please let us know, we can work with them to help revitalise their charity and provide a lasting legacy.

Similarly, if you know of businesses or individuals who are generating wealth and want to see it achieve a lot more impact, please point them in our direction. We have some fantastic examples of how local funding can generate enormous impact that we hope this report shows.

In whatever capacity you have engaged with us in the last 12 months – a huge thank you!

Here's to more exciting and inspirational times ahead!

**Phil Ewing**  
Chairman

**Tina Costello**  
Chief Executive

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# Highlights

## WE LAUNCHED THE WESLEYAN FOUNDATION.

We launched our £1million partnership with Wesleyan at their AGM, delivering our largest corporate responsibility programme across the UK.



## ^APRIL 2017

## CHARLES STANLEY HOSTS RUGBY THEMED DINNER RAISING £5,000.

Charles Stanley Wealth Managers in Birmingham hosted a rugby themed fundraising dinner at Edgbaston Golf Club in Birmingham raising £5,000 for the Foundation. Special guests included World Cup winners Neil Back & George Chuter.

## ^MAY 2017



## AUGUST 2017 ^

## WE AWARD £25,000 TO SUPPORT THE COVENTRY UK CITY OF CULTURE BID.

To support the Coventry 2021 bid for UK City of Culture we awarded £25,000 of our own funding to Talking Birds, Theatre Absolute and Positive Youth Foundation to deliver three projects showcasing culture across the city.



## SEPTEMBER 2017 ^

## PRIVATE DINNER WITH ANDY STREET, MAYOR OF THE WEST MIDLANDS.

Sir Dominic Cadbury invited Andy Street to The University of Birmingham to meet with a range of senior stakeholders and business people from across the region to hear about our work.





## PHIL EWING BECOMES OUR NEW CHAIRMAN AT ANNUAL SHOWCASE IN COVENTRY.

Phil Ewing took over as Chairman of the Foundation at our annual showcase event. Paul Belfield stood down from the role after 4 years in charge.

## WE RECEIVE ANONYMOUS £4MILLION DONATION TO SUPPORT VULNERABLE PEOPLE.

We received an anonymous donation of £4million. In 2018 we will fund up to 3 major projects across the region with close to £3million to provide effective housing solutions for vulnerable people.



^OCTOBER 2017

^DECEMBER 2017



JANUARY 2018^

## WE RECEIVE A £20,000 DONATION FROM TRUCK DISTRIBUTORS KELTRUCK.

Truck distributor Keltruck, based in the Black Country donated £20,000 to support our #iWill Youth Social Action Fund, helping local young people volunteer and campaign for stronger local communities.



MARCH 2018^

## COMMUNITIES UNCOVERED RESEARCH REPORT LAUNCHED AT THE UNIVERSITY OF WOLVERHAMPTON.

Following 12 months of research to unearth the most pressing needs of communities in Birmingham and across the Black Country, we launched the report at Chancellors Hall, The University of Wolverhampton.



**our year  
in numbers**

**£2.5m  
Awarded**



**417,368  
People set to benefit**



**936 Grants Awarded**



**42 Funds Managed**



amount awarded  
per city/region

£586k  
Birmingham

£1.2m  
Black Country

£219k  
Coventry

£204k  
Warwickshire

£48k  
Solihull

top 5 project  
themes



strengthening  
& developing  
communities



tackling ill  
health &  
wellbeing



promoting  
education &  
learning



supporting  
people with  
disabilities



providing  
counselling, advice  
& mentoring

**Case Study:**

# Handsworth Community Choir

increasing  
wellbeing &  
preventing  
isolation

**“If I don’t get to do anything else in the week I want to come to choir.”**

**During the summer, Handsworth Community Choir encouraged local people along to the community centre to give singing a go.**

The project, which addresses social isolation, particularly for older people, has engaged 60 local people to take part in weekly choir practise. Most of those who take part are over 60 years old and the weekly rehearsals are an important and meaningful social activity for them. The project brings together people from all walks of life, many of whom have become friends since joining.

We met Patricia, who moved to the UK in 2003 from the Caribbean. She joined the project in 2015 having fought the urge to sing regularly for far too long:

“I was in a Sunday school choir, a junior and secondary school choir but I hadn’t really sung until I came here. Since then I have loved it and I’ve been coming ever since!”

Due to a cut in income, the choir decided to set up as a charitable organisation.

During that transitional period Patricia went from member to treasurer in a bid to keep the group afloat:

“It was a worrying time in the early days because we couldn’t have kept going with just membership fees, that’s why grants have been so helpful.

“We want to make it as affordable as possible, charging more would defeat the whole purpose. It’s not a moneymaking venture. It’s supposed to make the community feel good!

“We’ve got people from all different backgrounds and nationalities. I love the camaraderie, the people make you feel welcome, you chat to everybody and singing always lifts my spirits!

“It’s great for your mental health, I always say if I don’t get to do anything else in the week, I want to come to my choir!”

Spearheading the organisation

is Tonia Clark, she’s trying to encourage more people in the area to get involved:

“Handsworth is quite transient, it’s quite a deprived area, so getting people to join can be tricky.”

The project is proud to deliver a unique activity for the local community and are trying to reflect that in their music:

“We’re speaking to a number of artists involved in reggae and Bollywood to try and develop our offer for different audiences and broaden our repertoire. We try hard to identify with all groups inside our community.”

**We awarded Handsworth Community Choir £800 to help them deliver the summer choir sessions.**



**Case Study:**

## **Bold as Bard**

**promoting  
inclusivity  
through art**

**“A year ago I could barely leave the house.”**

**Ego Performance Company is based behind the Transport Museum on the edge of Coventry City Centre. The charity has been supporting people of all ages and abilities since 2006.**

In 2016, Ego set-up Bold as Bard, a project supporting people with learning disabilities with opportunities to access theatre making, with a focus on Shakespeare. One of the project's success stories is Lewis.

Lewis has Asperger syndrome and had previously found himself homeless in Coventry. He was referred to Ego by the support team at homelessness charity, Crisis:

“I heard about Bold as Bard and I've been here since day one.

“I've experienced so many benefits since I've been involved with drama. A year ago, I could barely leave the house and now I'm doing auditions!”

Following Lewis's plunge into acting, he auditioned for the BBC Class Acts programme which saw 30 disabled actors get the opportunity to attend a three-day workshop and audition in front of various casting directors.

Out of the 400 applicants, Lewis was successful:

“It was an amazing experience to be part of Class Acts. I made some great friends through it.”

The aspiring actor has big ambitions, but his experiences have given him the drive to make a difference for others. Lewis recently co-founded a charitable theatre company:

“I want to be a professional actor but the charitable theatre, Underground Lights, is really important to me.

“It's a very specific theatre company supporting people with social disadvantages such as disabilities, homelessness or mental health issues.

“If you are in bad place drama can help, I want to share that with others who may need it as well, it's just magic.”

Artistic Director, Katy Stephens who runs the Bold as Bard

project is preparing the group for their first performance:

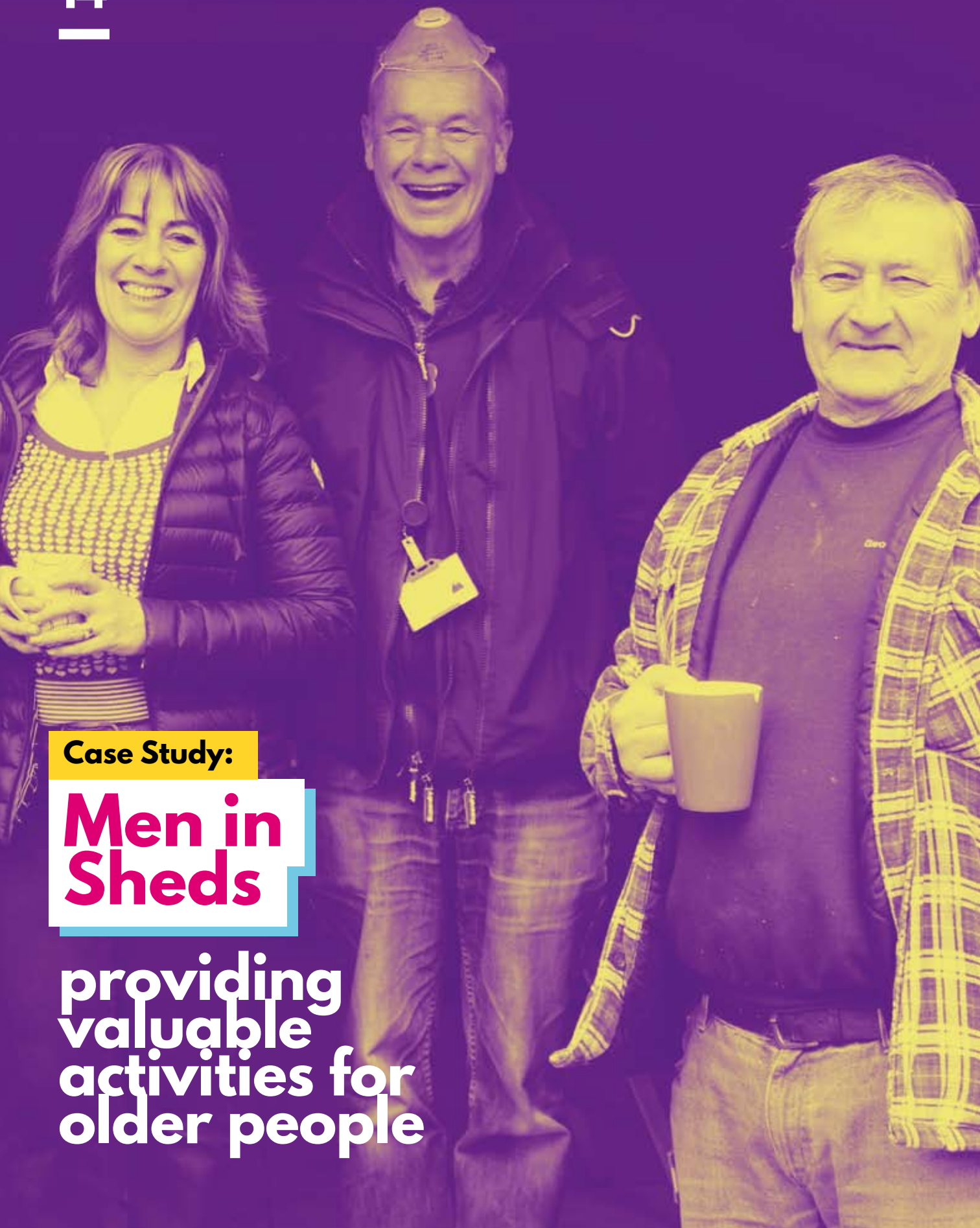
“I was terrified because as an actor, I'm used to being told what to do, not the other way around, but I love it!”

Katy takes an enormous amount of pride in getting the best out of her group:

“We've become a little family really.

“It's just about working individually with everyone and finding out what sort of support they need. I want to make sure everyone is challenged.”

**We awarded the Bold as Bard project £75,000 over three years to enable the project to work with even more people like Lewis.**



**Case Study:**

## **Men in Sheds**

**providing  
valuable  
activities for  
older people**

**“If we hadn’t got this, we wouldn’t be here today.”**

**Walking through the corridors of Nuneaton’s George Elliot Hospital you begin to hear the faint noise of drilling and chatter, that’s where we met Corrine and Charles.**

Corrine Davies, Community Liaison Officer tells us how important the Men in Sheds project is for the community: “There’s not much around here for men really, if you’re not into sport there’s even less!

“It’s the social aspect that has the biggest impact. The chatting, the cups of tea that sort of thing!”

Following a recent relocation, the project has been forced to up its fundraising as well as saving to help set up a new lodge in the hospital’s grounds.

“This will be a base that can be used by other groups, the chaps are renovating it now and they’re going to build a big table top, so they can cover their equipment. It won’t just benefit them but others in the local community!”

Charles has been part of the group since its inception and hasn’t looked back: “This is something to look forward to, so you keep on smiling, we’re happy souls!

“What’s the appeal? Well, as you get older you have less and less to do. This gets you off your behind, gets your brain going and the cogs start spinning again!

“It’s nice to do things with other people, this is where the social aspect comes in, to me that’s far more important. You’re working, you’re keeping your mind clear.”

However, despite the obvious benefits that the project offers it can be quite difficult to attract new members.

“I was fortunate that I worked until I was 70 and had a wife

that didn’t want me in the house! It’s horrible to just sit on your own, people just waste.

“It’s difficult to find people in the same situation.”

This message is relayed by Corrine: “We advertise where we can, but it is hard to reach people. It’s often people’s family that give them the nudge and get them out there!”

**The Foundation awarded the Men in Sheds project a grant of £2,000 from the Coventry, Solihull & Warwickshire Fund to help them purchase their new lodge.**

Case Study:

# Kingsbury Swimming Club

increasing  
wellbeing &  
preventing  
isolation

**“It’s not the first time I’ve swam but I like it better here, it’s so fun.”**

**Kingsbury Aquarius Swimming Club based in Chelmsley Wood, North Solihull provides swimming lessons and coaching for children aged 4+ offering potential progression to their competitive swimming programme. The group welcomes children of all abilities to come along and get involved.**

The club noticed a decline in local families bringing their children to swimming lessons and believed this was due to affordability. They applied to the Foundation for a grant to enable parents on low incomes to bring their children for free.

Tammy and Jamie’s son, Jenson, has attended all the sessions on offer and his parents have started to see progress:

“A number of years ago we paid for lessons, but they were quite expensive. We would pay £5 a lesson but he wouldn’t get the attention he needed, we didn’t see much progress, so we stopped.

“He enjoyed being in the water, but he wasn’t very confident, but he was young, and age is important. He has experience in the water so now he’s at a good age to kick on and learn.

“He’s made big improvements in the 6 weeks that he’s been here and we’re feeling much more confident.”

The importance of free lessons hasn’t gone unnoticed, Jamie told us:

“There are families out there that can’t afford lessons so when schools, or community projects, can do something like this, although it’s less beneficial for some people it can be massive for others.”

On the eve of his last lesson, Jenson told us how he felt about coming to the classes:

“It’s not the first time I’ve swam but I like it better here, it’s simple, they don’t make me do complicated stuff. It’s so fun, Thursday’s are my favourite days, I don’t want it to stop.”

**The club received £880 from the Foundation through the Comic Relief Community Cash Fund to deliver the project.**



**Case Study:**

# Heavens Kitchen

**tackling food  
poverty &  
supporting  
homelessness**

**“I love it, it’s our community and I’m just glad we can give something back.”**

**Heaven’s Kitchen, a project supporting people who are vulnerable and suffering from food poverty, rough sleeping or homelessness are based at Dudley Community Centre. Their team of volunteers work tirelessly to ensure that local people have a place to eat and receive support in a safe environment.**

Malcom Jones, Project Manager, told us how it all began:

“In 2007, me and my wife were fed up of doing Christmas at home, it was getting boring. The kids had grown up and we decided to give something back. We approached the Dudley Community Church and we worked out some budgets. My wife works in catering and I’ve got the gift of the gab, so we were on our way.”

However, things are not always positive at the centre:

“It’s really sad; we’ve had three of our regular service users pass away in the last few months. People come here who have lost their jobs and you’ve got people living on the streets with addictions.

“But, we’ve grown into an important place, we’ve sent people into rehab and given them huge opportunities. Now we’ve earned their respect and so it polices itself, they know we do it for them.

“It costs us £5,000 to run this place for a year but the grants we get cover all the equipment costs, if we had to source that as well we’d be constantly fundraising. I work five days per week, and have pretty much a full-time job here, that’s my life, it’s never ending, but I love it. It’s our community and I’m just glad we can give something back.”

Whilst we were chatting to come of the service users we met Michael, he told us that he was recently released from prison, and juggling caring for

his partner and trying to support himself daily:

“I’ve spent the last year in jail and this place has really helped me out, they do food bank tickets, offer support, help me make calls things like that.

“I’m trying to get back on my feet, I’m managing with food but at the moment I’m struggling with electric and gas. I’m currently a carer and my Mum isn’t very well, unfortunately I can’t see her because she’s three buses away and I just can’t afford it.”

**Heaven’s Kitchen were awarded a grant of £950 from the Foundation with funding from the Comic Relief - Community Cash Fund.**

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# COVENTRY UK CITY OF CULTURE 2021



**Back in early 2017, our trustees decided to allocate a proportion of our surplus funds to support Coventry's bid to become UK City of Culture in 2021. We met with a range of key stakeholders close to the bid as well as the Coventry 2021 Trust and set about searching for projects which could tell the story of Coventry by including and engaging local communities.**

We awarded £25,000 to three organisations based in the city to involve local people from all walks of life in cultural activities which celebrated diversity and heritage and also relayed the message of Coventry as a young, diverse, modern city re-imagining the role culture can play in bringing people together.

We gave £10,000 to the Talking Birds Theatre Company. The funding was used to take a touring cart across the city to engage with communities and provided a pop-up pavilion, community forum and a creative workshop space for local people to have their say about Coventry and its culture.

Positive Youth Foundation received £10,000 to deliver their impressive centrepiece to the City of Culture bid, the Changing Trax Concert

at Warwick Arts Centre. Our funding was used to give young musicians from inner city areas in Coventry the opportunity to work with professional musicians and an orchestra. The talented group dazzled the audience with a fantastic evening of live music and entertainment at The University of Warwick which provided a stunning backdrop to the cities bid.

Finally, we supported Theatre Absolute with a £5,000 grant to support the delivery of the first ever shop front festival in the UK. The full weekend of theatre and art took place right across Coventry City Centre making use of empty shop spaces and retail outlets bringing culture out onto the busy streets of Coventry.

Julia Negus, Writer and Producer at Theatre Absolute said:

"It is incredibly important that we nurture and support the next generation of theatre makers and artists in Coventry and across the wider region."

Held in March 2018, the festival gave a unique platform to lots of emerging artists in the city helping young and older people to take part and experience theatre as well as those who are disadvantaged or unemployed.

Following our investment in the City of Culture activities we were delighted with the announcement that Coventry went on to secure the City of Culture title. We are proud to have supported the bid, enabling communities from across the city to engage in the process and become part of the cultural experience over the last twelve months.

### **What next?**

Following the successful bid to become UK City of Culture the team at Coventry 2021 appointed the Foundation as its grant making partner to distribute the City of Culture Fund. In 2018, we will be awarding over £100,000 to projects that support the vision of the bid and projects which play an active role in the run up to 2021 programme.

Emma Harrabin, the Coventry City of Culture Trust Programme Co-Ordinator, said:

"It's massively important to us that City of Culture is delivered by and for the people of the city. The Foundation will manage our grants programme and there will be opportunities for both individuals, and organisations, to access grants of up to £10,000. With a wide variety of activities able to be funded its certainly an exciting time for arts and culture in Coventry."



## Community Matters in the Black Country

**Community Matters is a 3-year employment and skills project in the Black Country. The project aims to support over 1,000 local people back into work, training and job readiness through a variety of creative and tailored schemes delivered by local agencies in Dudley, Sandwell, Walsall and Wolverhampton.**

The project which began in 2016, is led by the Foundation and delivered by a network of partner organisations in local community venues. Our partnership is delivering against a set of priorities which were developed by the Black Country Local Enterprise Partnership (LEP) to increase employability, skills and economic prosperity for the people of the Black Country.

Community Matters which is worth £5million, is just one quarter of the BBO strategic partnership in the region which also includes another three large projects being delivered by Steps to Work, Walsall Housing Group / Accord and Black Country Together respectively. Each project has a specific nuance relating to matters such as financial inclusivity or family support. Our project is all about community and localism, our

partners develop responses to the noises on the ground and react to what the community needs.

Jointly, these four projects will deliver combined investment of £23million into the region to tackle stubborn issues affecting employment opportunities for the hardest to reach as well as improving lifestyles, skills and wellbeing. Activities being delivered

through the project include one-to-one coaching, accredited training courses, soft skills sessions, counselling, advice and guidance workshops and job clubs to name just a few.

The project is co-financed by Big Lottery Fund and the European Social Fund as part of the Building Better Opportunities (BBO) programme.

### PROJECT STATISTICS

**676**  
people  
enrolled

**379**  
(56%)  
lack basic  
skills

**81**  
(12%)  
do not  
have primary  
education

**22**  
(3%)  
are homeless

**35**  
(5%)  
are  
ex-offenders

**240**  
(36%)  
have a disability  
or a long-term  
health condition

**387**  
(57%)  
live in a jobless  
household

**260**  
(38%)  
of participants  
are BAME

Average length  
of unemployment  
upon joining the  
programme is  
**56**  
MONTHS

**84**  
have moved into  
employment,  
education  
or training

**Case Study:****Ideal  
for all****Investing in skills,  
training and employment**

Ideal for All based in Smethwick provide skills and training development for people looking to upskill and find work. Through our Community Matters project, they are helping local people to run a local allotment growing fruit, vegetables and all kinds of flowers.

The rain is lashing down when we arrive, and we can see participants ducking and weaving to avoid getting soaked. Based at Salop Market Garden in Oldbury, local unemployed people learn a variety of skills, including how to grow their own produce and keep on top of the day-to-day running of the allotment.

Tim Botfield, site manager at Salop Market Garden, welcomes us with a cup of tea and tells us how Ideal for All are using the gardens to work with local people to build confidence and

skills leading to employment for some of their clients.

“Everything is client tailored, we adapt to each person! We’ve got people of all abilities here, from fully active adults to those that are heavily restricted in their movements but they all find something to do. We’ve worked with people with severe learning difficulties and the well-being they have got through that is absolutely immense.”

Emelye Westwood, project lead at Ideal for All, tells us more about the impact of the project:

“The specific production skills people learn here can be replicated in the commercial environment and it can be hugely therapeutic; for Community Matters that’s great.”

“Our work gives people confidence, knowing that

somebody cares about them. It’s that self – worth that changes people’s lives dramatically.”

We also spoke to Liam, one of the participants on the project. Quiet and unassuming you can tell he was at ease and relaxed in the allotment, working around the churned soil as he planted beetroot seeds with a smile on his face.

“I come down here twice a week. I came on work experience when I was at school and I love it.”

Ideal for All is one of 19 local organisations delivering our Community Matters project in community venues across the Black Country. Their user – led approach is designed to make life better for disabled, elderly, vulnerable people and their carers.

# The Wesleyan Foundation

**Back in April 2017, we were buzzing with excitement as we announced the launch of the £1million Wesleyan Foundation at their HQ in the heart of Birmingham's business district. The financial mutual, founded in 1841, were keen to explore their corporate social responsibility programme in more detail and enlisted our help when they first tabled the suggestion of a Charitable Foundation.**

Following their successful fundraising to build Magnolia House, a purpose-built space supporting the families of children with palliative care needs at Birmingham Children's Hospital, Wesleyan decided that a local approach, but one that spanned the entire country, was needed for their next big project. They approached us with an idea to set-up their own Foundation but weren't quite sure what this might entail.

Managing a Foundation is a fantastic, rewarding and altogether inspiring experience for many businesses, but often the initial impact and momentum can falter due to the burden of administration and ongoing legal and fiscal requirements, especially when there is a day job to do. Sometimes these factors make it hard to share and

celebrate the great work that takes place, and the original purpose can be lost.

As a Community Foundation, we support and enable local businesses to manage their charitable giving with ease. Our model takes away the burden of governance, provides independent and responsible management and leaves the fun stuff to you and your employees.

We worked with the team at Wesleyan to design a solution that works for them. We manage the back-office infrastructure and processes, enabling them to make grants and donations to the causes and projects they care about, engaging their employees and members with the projects they support right across the country.

Since the partnership began, we've awarded over £678,000 in grants, stretching the length and breadth of the UK. We work in partnership with Community Foundations in 12 major cities around the country

distributing funding in areas such as Belfast, Edinburgh, Leeds, Sheffield, Bristol and Cardiff to name just a few. By working with the network of Community Foundations around the country, we are able to fulfil all of Wesleyan's expectations.

By the end of 2018 we expect to have hit the £1million mark. We will celebrate that achievement by bringing together the projects lucky enough to receive a slice of the funding so that they are able to share their inspiring stories with Wesleyan and their staff.

## Here are some of the amazing projects we have funded:

RDA a charity based in Stratford-upon-Avon, provides support to adults and children living with a disability to take part in horse riding. The group were awarded £6,000 from the Wesleyan Foundation. We met Jess and her Dad Andy, Jess has been coming to RDA for over 2 years. Andy told us about the impact of the project for his daughter:



"She's gradually improved and has been able to progress. When she's unsure about a situation her hands go up, but with the constant movement from the horse and the encouragement from the volunteers it's almost been a natural thing for her to take the reins!"

Jo, who is one of the volunteers at the project and has been involved with the charity for 7 years told us: "I have a progressive neurological condition, it's untreatable. I suffer constant pain, except when I ride. Riding takes the weight off my spine.

"I've had lots of support from the group, I've been given the chance to do the things I used to love. I couldn't possibly have done it without them; I'm part of a community. As you get older, living with a disability means there's less and less you can do. But that's not the case for RDA. They've given me so much, it's great to have this opportunity!"

Pedestrian, a charity delivering training and education projects for young people and vulnerable adults in Leicester received £9,225 from the Wesleyan Foundation to set up 'Drop-in Beats and Bars', offering educational support through art.

Delivered by a team of trained



professionals the sessions engage and empower participants to achieve their potential through a variety of creative activities.

Project Manager, Kate Rounding, said:

"It's exciting to be involved in our new project 'The Drop'. We will be hosting a series of music-based drop-ins supporting young people who are aiming to develop their skills and progress their interests in a creative career.

"Mentoring young artists and providing information about the possible progression paths and career options in the creative industries is one of our key strengths and we are committed to extending opportunities."

A participant on the programme said:

"I didn't know about music production before, or the mixing process. It was a privilege to work with industry professionals and great that you can get a qualification through it."

Working to reduce the impact of youth homelessness throughout Nottingham, Broxtowe Youth Homelessness project provides support to young people aged 16 – 25 at risk of sleeping on the streets.

The project provides a drop-in centre for young people who are experiencing, or at risk of homelessness. The project received £7,854 from the Wesleyan Foundation to help deliver the programme, allowing the organisation to open a drop-in centre, three days per week for 12 months.

Jade, who has used the project for support said: "It's been great! They taught me things I've needed help with like independent living and emotional resilience."

Jade has been using her experience to educate others:

"I've even been going into schools, helping with workshops and sessions, showing students that the stereotypes of homelessness aren't always right. If there's anyone who's struggling, then I'd really encourage them to get in touch."

Councillor Richard MacRae, or Stapleford North Ward Nottinghamshire, gives his support to the charity: "It goes without saying that Broxtowe Youth Homelessness is a lifeline to so many people. I don't doubt for one minute that lives have been saved from help given by this great local charity."

## Working with us

your trusted  
charity partner

**We're proud to work with a wide variety of donors including individuals, businesses, property developers and other trusts and foundations to develop funds which are used to support communities across the West Midlands and Warwickshire.**

Please contact Tina Costello our Chief Executive via email: [tina@heartofenglandcf.co.uk](mailto:tina@heartofenglandcf.co.uk) if you would like to discuss your charitable giving.



## 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 and families to set up a named fund in memory of a loved one or in support of one or more causes and social themes you care about. We take care of the financial and legal requirements leaving you to work alongside us to fund vital work in local communities.



## transferring your charity trust or assets to us.

Managing a charity trust long-term 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.



## 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.

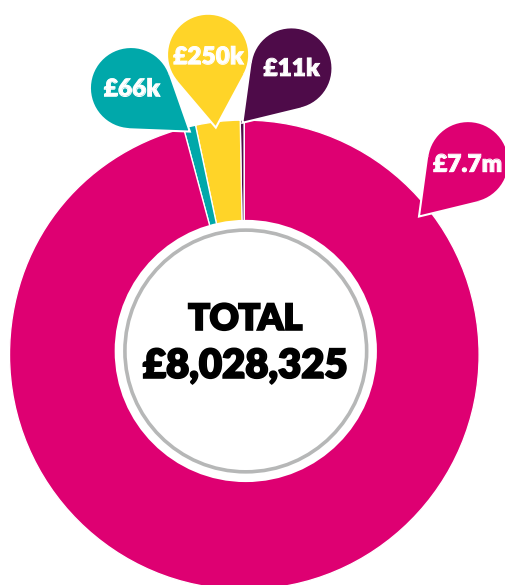


## but don't just take our word for it.

'We knew when we set up the Wesleyan Foundation that we would need help to run it. While we are experts in financial services and have an experienced Corporate Responsibility Manager, we don't have the capacity or expertise to manage the huge amount of administration and due diligence that comes with running a grant giving body of the size and scale of the Wesleyan Foundation.'

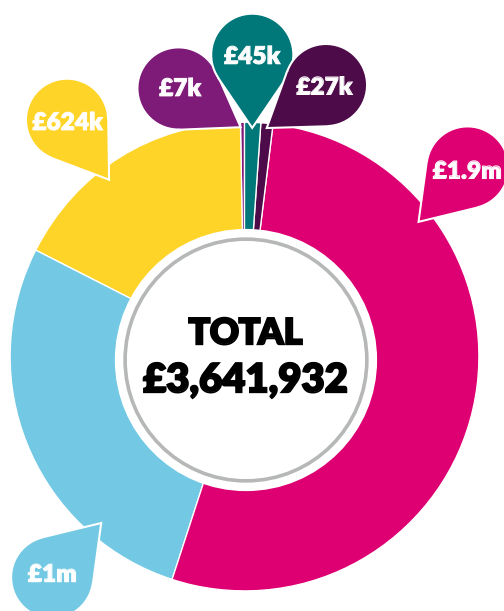
'Heart of England Community Foundation have been on-hand since the beginning to advise and guide us through the whole process. We can fully rely on them to manage the distribution of funds in the right way which means we know that our Foundation is being expertly managed, and the money is going to the people and causes that will benefit most from it.'

**Caroline Hill, HR Director, Wesleyan**



### INCOME

- Donations & Endowment Income
- Rent
- Investment
- Bank Interest



### EXPENDITURE

- Fundraising
- Investment Managers
- Grants & Funding Contracts
- Building Better Opportunities (ESF)
- Support Costs
- Governance Costs

### FOUNDATION FUNDS

Endowment Funds	9,392,893
Restricted Funds	5,016,276
Unrestricted General Funds	623,608
Unrestricted Designated Funds	883,294

### NET ASSETS

Investments & Properties	10,915,521
Net Current Assets	5,556,059
<b>Total Net Assets</b>	<b>16,471,580</b>

# endowment funds

29

Endowment Funds	Value at 31 March 2017 (£)	Value at 31 March 2018 (£)
100 Club Birmingham	47,461	47,465
Ambassadors Fund	88,557	87,817
AXA Fund	210,221	207,422
Birmingham Mail Charity Fund	41,714	47,488
Charles Henry Foyle Grassroots Fund	40,953	40,957
Clarendon Court Sports Fund	7,021	6,927
Clarke Willmott Grassroots Fund	23,168	23,169
Connie Watts Fund	18,041	18,043
Coventry Lord Mayor Fund	22,562	22,262
Coventry Nursing Trust	355,436	351,442
Deutsche Bank OI Grassroots Fund	129,768	132,167
Deeley 3 Peaks Fund	11,992	11,833
Forest of Arden Golf Club Captain's Fund	19,459	19,200
Friends Fund	17,549	17,747
Friends Provident Fund	12,349	12,185
Building Better Lives Fund	-	968,977
George & Vera Bryan Grassroots Fund	182,366	185,737
Harry Payne Fund	2,541,692	2,573,567
Heart of England Fund	414,706	409,184
High Sheriff of Warwickshire Fund	137,951	144,291
James Kenning Fund	44,105	44,892
Jobson James Grassroots Endowment Fund	20,009	20,011
Jumping Through Hoops Fund	611,507	616,170
Kingscliffe Fund	172,203	169,910
Midland Heart Fund	111,530	110,045
Mills & Reeve Grassroots Fund	60,674	61,795
National Grid Fund	73,908	72,924
Orbit Heart of England Fund	162,420	160,257
Property for Kids Grassroots Fund	23,865	24,306
PSA Peugeot Citroen Fund	365,314	360,449
Rider Levitt Bucknall Grassroots Fund	2,384	2,385
Rolls Royce Fund	68,618	67,704
Solihull Community Foundation	216,157	220,014
The Heatherlea Grassroots Fund	213,197	213,218
Torrington House Fund	209,040	207,385
Trustees' New Deal Fund	33,520	36,233
Warwick Lying-in Trust	39,255	40,202
Willenhall Community Trust	55,604	51,447
Youell Family Fund	2,146,222	2,141,174
<b>Endowment Total Value</b>	<b>8,952,498</b>	<b>9,948,401</b>

# summary of funding

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

Funding Portfolio	No. of Awards 2017/18	Total Awarded 2017/18 (£)
29th May Flow Through Fund	19	11,750.00
29th May Small Grants Fund	1	1,280.00
AXA Enterprise Fund	3	4,649.00
Band Hatton Button Fund	1	2,000.00
Birmingham & Black Country Fund	40	60,756.00
Birmingham Mail Charity Fund	1	500.00
Birmingham Sports Association Fund	8	7,952.00
Building Stronger Britain Together Fund	5	122,026.00
Chamber of Commerce Presidents Fund	1	1,994.00
Comic Relief Fund	94	124,182.00
Community Energy Warwickshire Fund	4	7,952.00
Coventry 2021 Fund	3	25,000.00
Coventry Building Society Fund	18	25,629.00
Coventry Community Games Fund	1	2,000.00
Deutsche Bank Fund	1	5,000.00
'Fourteen' - Spirit of 2012 Fund	26	79,477.00
Harry Payne Trust Fund	118	88,500.00
Harrison Beale Owen Fund	2	3,993.00
Heart of England Cooperative Fund	107	34,435.00
Heart of England Fund	21	29,084.00
High Sheriff of Warwickshire Fund	9	4,500.00
Jumping Through Hoops Fund	52	113,044.00
Kingscliffe Fund	1	4,800.00
Love Leamington Fund	7	9,500.00
National Grid Fund	1	660.00
Orbit Hardship Fund	197	64,133.00
Peugeot Fund	6	11,381.00
Positive Futures Fund	20	91,714.00
Rolls Royce Fund	1	1,268.00
Royal London Fund	1	5,000.00
Solihull Community Trust Fund	6	7,009.00
Sport Relief Fund	1	2,000.00
Tipton Education Fund	1	2,000.00
Torrington House Fund	3	1,945.00
Wesleyan Foundation Fund	71	311,045.00
Women and Girls Fund	11	145,000.00
Youell Family Fund	23	42,555.00
Young at Heart Fund	2	3,180.00
Youth Social Action Fund	24	106,381.00
<b>General grant-making Sub Total</b>	<b>917</b>	<b>1,581,274.00</b>
Big Lottery Fund & European Social Fund - Building Better Opportunities Community Matters Programme	19	1,002,304.00
<b>Funding Portfolio Totals</b>	<b>936</b>	<b>2,583,578.00</b>

## partners & supporters



## senior management team



**Tina Costello**  
Chief Executive



**Helen Kendrick**  
Senior Manager -  
Operations



**Claire Evans**  
Senior Manager -  
Finance



**Ryan Boyce**  
Senior Manager -  
Development

## operations team



**Ellen Alcock**  
Grants Manager



**Jennifer Gilder**  
Senior Grants Officer



**Louise Cotton**  
Grants Officer



**Sue Heyes**  
Grants Officer



**Aaron Greaves**  
Communications Officer



**Joanne Farr**  
Finance Officer



**Naadira Moyeed**  
Finance Officer



**Jennifer Tullett**  
Administrator

## community matters team



**Tony Costello**  
CM Partnership  
Manager



**Sanjay Chand**  
CM Finance Officer



**Robert Brydon**  
CM Database Officer



**Ben Slater**  
CM Partnership Officer



**Hasmita Parmar**  
CM Partnership Officer



**Dean Kindon**  
CM Finance Assistant

## 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**

## volunteers

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

Adam Hives  
Afzal Hussain  
Alan Crawford  
Andrea Clark  
Andrew Didlick  
Anna-Marie Keane  
Beverley Thomas  
Bob King  
Cary Evans  
Chris Lillington  
Chris White

Christine Tait  
Dipali Chandra  
Donald Payne  
Duncan Cadbury  
Emma Brodie  
Father Christopher Wilson  
Fionnuala Bourke  
Fred Rattley  
Harjort Kalirai  
Helga Edstrom  
Ian Carey

Jamie Richards  
Jenny Murray  
Jessica Wilkes-Reading  
Kate Hazlewood  
Keith Sinfield  
Kelley Davidson  
Leonie Yeend  
Louise Beddoe  
Louise Dowling  
Martin Jones  
Mike Judge MBE

Parminder Birdi  
Pauline Roche  
Priya Tek-Kalsi  
Rachel Lancaster  
Rachel Southam  
Sarah Horne  
Sharon Palmer  
Sophie Tobin  
Tess McNamara  
Tony Jackson  
Val Glazzard

**Annual Review  
kindly supported by:**



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**heartofenglandcf.co.uk**

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