




A guide for Local Giving



If you're reading this, then the chances are you're already contemplating the power of giving in the West Midlands and Warwickshire. Whether it's your advisor, a trusted friend, or your own curiosity that led you here, welcome to Heart of England Community Foundation!

For nearly three decades, we've been on a mission to empower individuals, families, businesses, and organisations to make a tangible impact on local lives. As the CEO of Heart of England Community Foundation, I'm thrilled to personally invite you on a journey of giving that's as unique as you are.

Our approach? It's all about you. We tailor our strategies to match your philanthropic vision, fueling your passion for causes close to your heart while respecting your desired level of involvement. In this guide, you can explore our giving options and we hope this illustrates how, together, we can transform communities across the West Midlands and Warwickshire. Let's embark on this journey of generosity and change, hand in hand.



Tina Costello
Chief Executive

Heart of England Community Foundation is a registered charity and the leading, independent grant making foundation in the West Midlands and Warwickshire. Since 1995, we have proudly awarded over £35 million to over 7,000 great causes across the region.

We believe in a fairer, happier and healthier Midlands - where everyone has equal access to opportunities, experiences genuine wellbeing, and enjoys a healthy and active life as part of their community.

We nurture philanthropy, and unlock the resources to tackle local issues and to support people to thrive across the region, by connecting donors who care, with impactful community initiatives.

We're honoured to partner with a diverse range of donors, including private individuals and prominent regional and national companies. Each donor's journey is unique, and we're committed to making that journey as seamless and meaningful as possible.

We take the time to understand your motivations and aspirations for giving. By listening to you, and providing support throughout your giving journey, we develop a comprehensive understanding of what drives your generosity. No matter your personal circumstances, we're dedicated to helping you channel your kindness into tangible impact within your local community.

We streamline the giving process for you, giving you peace of mind. We handle complex legal and financial management, freeing you to focus on the rewarding aspects of community engagement. Regardless of whether you're an individual, a family, or a business, we're here to assist you in every step of your philanthropic journey, whether it's establishing a named fund, creating a legacy plan, or directing donations where they're needed most.

Some of our Highlights

OVER
£35MILLION
AWARDED TO
GOOD CAUSES

OVER
7,000
PROJECTS AND
INITIATIVES SUPPORTED

OVER
£20MILLION
IN LONG-TERM
INVESTMENTS AND
ENDOWMENT FUNDS

OVER
£2.5MILLION
AWARDED IN THE
LAST YEAR

OVER
1,500
INDIVIDUAL GRANTS
AND DONATIONS GIVEN
IN THE LAST YEAR

+65 FUNDS
UNDER OUR PRUDENT
MANAGEMENT AND
ADMINISTRATION

**Starting a
Charitable Fund**

**Starting a
Charitable Fund**

**Starting a
Charitable Fund**

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Charitable Fund**

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Kickstarting your philanthropic journey is straightforward and swift when you partner with the Community Foundation. By teaming up with us, you can promptly channel your generosity into the local community through a dedicated fund.

Our donors cover a wide spectrum, from private individuals to prominent regional and national companies. Each donor's path is distinct. We prioritise truly understanding your motivations and aspirations, delving into the what, how, and why of your giving. Only then do we craft a fund, tailored to your objectives. This comprehensive approach helps us gain a holistic view of the impact you want to create through your charitable contributions.

Launching a fund with us is not only efficient but also tax-effective. It offers a streamlined alternative to establishing a separate charitable trust, freeing you from legal and administrative complexities. We manage these intricacies on your behalf, allowing you to concentrate on making a genuine impact and witnessing the transformative change your generosity fosters.

Endowment Funds

In an Endowment Fund, your contribution is strategically invested for the long term, professionally managed with the goal of capital and income growth. Yearly grants are allocated from the earned income, enabling you to contribute to both current initiatives and build the capacity to address future community needs. With time, the amount distributed will surpass your original donation, leaving a lasting legacy for your community.

Flow-Through Funds

In a Flow-Through Fund, your gift is maintained as cash, promptly used to support grants within a short time frame—usually within a year of receipt. Flow-Through funds allow you to enhance your capability to meet present needs. However, sustaining this fund requires an annual contribution to ensure its ongoing impact.

Hybrid Funds

Our “Hybrid” Fund offers the best of both. We combine elements of both Endowment and Flow-through structures. This offers you a larger pool of funds for immediate grants, alongside a reserved portion for future endeavours. This approach ensures both short-term impact and sustained, enduring support.



CREATING FUN FAMILY MEMORIES

#LITTLEMOMENTS

Pay	DRAYTON MANOR	Date	5 th JUNE 18
	COMMUNITIES FUND		
		£	9,962

040604 1270290 0029091*

Why do donors choose to work with the Community Foundation?

WE ARE A DEDICATED LOCAL HUB FOR GIVING

With almost thirty years experience supporting local organisations across the region, we have deep roots and connections with thousands of good causes locally.

WE MAKE GIVING EASY, REWARDING AND FUN

Our friendly and experienced team handle all of the administrative tasks, grant making and donation handling, working alongside you to offer the opportunity to be as directly involved as you wish.

WE HAVE THE INSIGHTS AND DATA YOU NEED

We develop data and analysis from across our grant making to give you insights about where your funding can have the most impact and how your generosity can support local projects.

YOUR GIFT CAN BE A PERMANENT LEGACY

Choosing to start an Endowment Fund with the Community Foundation ensures a lasting legacy of giving forever - and a permanent resource for communities in the future as well as now.

WE OFFER A RANGE OF GIVING OPTIONS

We can adapt and personalise our model to support your giving to flourish flexibly. We will work with you at every stage to design grant making or donation giving that meets your vision.


WE RECORD AND REPORT YOUR IMPACT

We work alongside the local projects capturing stories, case studies, videos and photos - and we share these with you. You can also visit projects!

Some of our recent partners and fundholders







**What our partners,
donors and fundholders
say about working with us**



"Working with the Community Foundation allows us to draw on their vast experience and local understanding to ensure that financial support goes to those grassroots organisations that do such great work in their communities. The Community Foundation acts as a connector for us and really allows us to engage with those organisations and see for ourselves the difference that our grants are making to those communities."

KERRY AMORY

Social Value Manager, IM Properties

PEDDIMORE: A NEW ECONOMIC ASSET

Creating a great place to work for the Royal Town of Sutton Coldfield and Birmingham



DELIVERING LONG-TERM COMMUNITY BENEFITS

We are committed to providing support for the local communities that need it most.



PARTNERS IN COMMUNITIES

We will work with local schools and community groups as well as with major private businesses to help improve local communities.

WE WILL:



3,000



£270,000



£250k



GREEN AND SUSTAINABLE

We will deliver a Green and Sustainable Route Plan which helps create sustainable communities through sustainable development and supports Birmingham's green economy.

WE WILL:



PEDDIMORE: A NEW ECONOMIC ASSET

Creating a great place to work for the Royal Town of Sutton Coldfield and Birmingham



PEDDIMORE COMMUNITY FUND

Administered by the Heart of England Community Foundation, the fund will support local projects to foster sustainable social and economic change.



The £270,000 fund will include £180,000 donated by M Properties and £90,000 matched funding from third party organisations, helping to support local projects over the next six years.




In the first year, up to £2,000 is available to support individual community projects.

This could include grants for sports, community, health and well-being and social welfare projects and formal training and education programmes, which could help to support:

- Young adults to raise aspirations and achieve both mental and physical health
- Extended learning opportunities for families, or which deliver continued after-school
- Training and working opportunities for adults with learning difficulties, with a focus on women
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"We loved that Heart of England Community Foundation helps small, local organisations that often can't get money from anybody else. That was always our thinking from day one, non-national charities that are run by volunteers."

VALERIE YUELL

Major Donor - Youell Family Fund



"Sincere thanks to our wonderful partners Heart of England Community Foundation. Tina and her team continue to work tirelessly to make every penny of Wesleyan's investment into our communities count.

This year has been no different and they have supported the distribution of funds which will impact over 45,000 people across the UK."

NATHAN WALLIS

Chief of Staff, Wesleyan




PROJECTS
201

BENEFICIARIES
28,000

TOTAL AWARDED
£1 million

SLEYAN

FOUNDE



"As a Midlander, I wanted to help local charities and good causes where relatively small sums of money can have a large and immediate impact on individuals. The Community Foundation answered all these requirements perfectly. I discovered it would be possible to establish my own foundation under its auspices. This would result in lower set up and running costs, and no administrative burden compared with doing it myself."

GRAHAM GRIFFITHS

Major Donor - Graham Griffiths Fund





"We wanted our grants to be available to worthwhile projects in communities across our branch network, which stretches from Sheffield to Somerset. As a building society, we care about our members and we also care about the communities in which they live. But we found that we lacked the detailed knowledge to assess which projects were most able to benefit from our grants, especially when more and more applications were being made. After researching several Foundations, we realised the Heart of England Community Foundation would be the ideal partner to deliver grants in our home region of Coventry and Warwickshire. The Foundation produces insightful reports about all our grant giving for us, so we can see exactly what groups and projects are being supported and how our grants make a difference to the communities we serve. They are an absolute pleasure to work with, and I would say any company looking to improve the way it gives grants or funds out to projects should get in touch with them."

ANNA CUSKIN

Corporate Responsibility Manager at the
Coventry Building Society







**Are you inspired?
Here is a snapshot of how
we make a difference**

Supporting older people to keep active

Xpress-Yourself Dance CIC are an organisation who make dance accessible for older adults. Their work has a great focus on preventing social isolation as well as promoting healthy ageing, mental health and independence for older people. In September 2022 we awarded them a grant of £4,520 through the Solihull Celebrating Communities Fund for their 'Keep Dancing at Christmas' project. The project provides dance classes over the period leading up to Christmas for older individuals in the community. Local businesses have been supported and benefitted through the project, the dance project culminated in an event where local caterers were hired and also Sing Bentley Heath were booked to perform whilst everyone sat to enjoy their food.

Company Director at Xpress-Yourself Dance CIC, Faye O'Connor, shared: "Throughout this project the participants have formed friendships with people of similar age and share similar life experiences, forming a sense of belonging with their community. They've built their confidence and self-esteem through performing and know how much more they can personally challenge themselves going forward.

"The participants quite quickly became quite a tight unit which was noticeable in their body language as they were all tactile continuing to hold hands whilst we paused rehearsals to repeat steps for instance. Giving each other hugs to encourage and support one another, it was like dance had acted as a tool to eliminate uncomfortable physical touch."

Faye continued: "Recently one of the participants who performed lost her husband who she had been the primary carer for. She put herself forward to the project for the opportunity to meet new people, a reason to get up and out of the house and to have a positive focus. Other participants in the group were also widows and were able to offer her support and guidance through their friendship and shared experience.

"The dancing provided with her with a focus at home as she practiced the steps after each rehearsal. She also put herself forward to help us set up the room before the event and has been a great support to us an organisation. The other participants really looked after her and formed a community around her to make sure she knew she had support and purpose."



**AWARDED
£4,520 FROM
SOLIHULL
CELEBRATING
COMMUNITIES
FUND**

Supporting children with disabilities

Friends of Castlewood School were awarded a £5,000 grant from the Youell Family Fund to help continue their work for children with additional needs, including running a vibrant Saturday club. It's Saturday morning and there's a stampede of children as the doors at Castlewood School fling open. Sue Rumble, Group Fundraiser, said: "We've been running for 10 years. We normally have about 50 kids and we have 30 on the waiting list as a lot of the children can't use mainstream activities.

"We split them into six different groups depending on their needs. Some children are non-verbal, some are autistic, some use wheelchairs, two girls have brittle bones which can be quite tricky." The organisation provides much needed care for children and also provides space to allow siblings to join: "We offer options for children with needs to bring their sibling as well. Sometimes at home, they don't get pushed out as such, but their sibling gets priority. They don't moan about it, but here they can share their experiences with others." And of course, thanks to the excellent care, parents are provided with some much needed respite.

Asia's son, Rhasid, uses the service: "Having a child with special needs can destroy more able families, for me it meant having no more kids and sitting at home making sure Rhasid is ok. It can be quite a big, deep, dark world. Even family members don't understand. Since coming to this provision it's helped me get back into working. "I don't want to sound selfish, but it gives parents a chance to get on with things we need to do. Saturday Club is a blessing, I'm so happy."

Unfortunately, when children reach 11 the service is no longer available to them. Something Ravinder, another parent, is coming to terms with: "The service isn't just on a Saturday, they're always there to support us and answer any questions. I'm worried about my son being too old for the service, I'm trying not to think about it to be honest."

Finally, we caught up with Ella. Her son has autism but her daughter, as a sibling, takes advantage of the club: "The provisions are really good here, for £20 there are loads of things available. My youngest is profoundly autistic, I knew from the moment I came here that I was in the right place. They know how to talk to me and my child. My elder child is very withdrawn and needs to be part of a group too, she makes friends here. This makes me feel fantastic. Finding a playgroup is impossible for Julian and it's so important that my daughter Olympia has somewhere to go as well!"

A young boy with brown hair and black-rimmed glasses is sitting at a white piano. He is wearing a red and blue Spider-Man t-shirt. He is looking towards the camera with a slight smile. His right hand is raised in a gesture. The background is a cluttered room with various items on shelves and a doorway in the distance. A red decorative border is on the right side of the image.

**AWARDED
£5,000 FROM
THE YUELL
FAMILY FUND**

Supporting communities to access nature and green spaces

Caldmore Community Garden. Nestled in the heart of urban Walsall, Caldmore Community Garden stands as a thriving oasis of greenery amidst high and low-rise flats, offering respite and enrichment to a community often deprived of access to nature.

Through the funding, the Community Garden has supported local residents to access the new green space, especially for those who live in the surrounding flats and houses who lack gardens of their own. Through a series of engaging educational programmes tailored to families and individuals, the group has supported local people with a passion for gardening to nurture deeper connections with the natural world. As well as supporting local residents to access green spaces the garden is also being developed a place for enhancing local biodiversity with birds, insects and small animals living in the garden.

One local resident commented: "My best moment was the first day I went in. I'm known as a person who fears new experiences so I was really nervous that day and it was my first time volunteering. But the moment I went in, I was glad to see some other people I knew, but most importantly all the people and stuff there was so welcoming.

"I wouldn't say it (of) many places, but the garden felt like home, even on my first day. I'm free to my opinion, my voice is heard, my effort is appreciated. I feel (I) belong there. I love the respect they give for my religion, letting me pray and giving me the space. They are considerate about the food being halal for Muslim like us. I really want to thank them. Some weekends I just go to the garden like my therapy session to get away from schoolwork or even home. The memorable moment was painting the boards, i felt honoured to participate in such a beautiful artwork."

Another participant who took part in the project in the last twelve months said:

"This place is an absolute lifesaver for us. I don't know how we'd have continued with our home education without it. Invaluable events, activities, meeting others, a beautiful space!"

A photograph showing two men and a child working on building birdhouses outdoors. The man on the left is wearing a green jacket, a brown beanie, and glasses. The man on the right is wearing a green jacket and a black beanie. The child is wearing a blue jacket and a patterned hat. They are standing under a wooden pergola structure. The man on the right is using a yellow power drill to work on a wooden birdhouse. The child is holding a wooden birdhouse. The background shows a brick wall, red chairs, and a garden area. A purple circular graphic with white text is overlaid on the left side of the image.

**AWARDED
£18,192 FROM
THE COMMUNITY
GREEN GRANTS
FUND**

Contact Us

For further information about local giving please visit our website: heartofenglandcf.co.uk/giving.

Alternatively, if you would like to discuss your giving and for advice about starting a charitable fund or leaving a legacy please contact our Chief Executive, Tina Costello via email: tina@heartofenglandcf.co.uk



Working towards a fairer, happier & healthier Midlands.

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