



A GUIDE TO COMMUNITY FOUNDATIONS  
IN THE UNITED KINGDOM

# Imprint

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**U K C O M M U N I T Y**  
**F O U N D A T I O N S**  
GIVING FOR LOCAL GOOD

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**Dear community foundation leaders,**

On behalf of everyone in the UK community foundations network, I am delighted to welcome you to the UK for this study trip. I am sure you will have a fascinating and inspiring visit. I hope there's a lot you can learn from our community foundations – and I am sure there's a vast amount we can learn from you!

Unlike the US and Canada, community foundations in the UK have been around for some 40 years in the UK. The first was founded in the 1970s and most are over 10-years-old, so our network is well established and flourishing. We are proud of our role as community leaders and developers of local philanthropy. Our membership of 46 community foundations covers every postcode of the UK. We are proud to be part of a growing international movement and look forward to sharing our knowledge and experience with you.

The UK's community foundations together make grants of over £70 million each year, and we have a combined endowment of over £500 million. We are amongst the UK's largest grantmaking organizations. We deliver grant programmes for government, large corporates and leading third sector players such as Comic Relief and the Big Lottery Fund. But we are not complacent; we have a strong ambition to grow further. After many years of austerity and government cut-backs in the UK the needs of communities are increasing rapidly.

We are living in a period of fast, and sometimes unpredictable, change – politically, socially and demographically. And as our civil society continues to evolve, the role of community foundations must adapt to remain at the cutting edge. We must grow and develop as community leaders and as promoters and catalysts of local philanthropy.

We are delighted to have the chance to share with you our Great British version of community foundations. We will be open about both our successes and our challenges. We are convinced that, by sharing learnings and best practice, our networks will become stronger and more resilient.

My colleagues and I at UKCF wish you an enjoyable visit and very much look forward to meeting you and spending time together at the ECFI European Conference.

With best wishes,

Fabian French

Chief Executive Officer, UK Community Foundations



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# FACTS AND FIGURES

## Preamble

The UK is a federated country with a population of 65 million. There are 46 accredited community foundations, with Scotland, Northern Ireland and Wales having one each. England, with the largest population, is home to the rest.

Each community foundation acts like a prism, focussing energy on the local community. Each draws in donations of time, money and expertise from philanthropists, private sector givers, the statutory sector (public), international, national and local charities, trusts and foundations. These resources are then focussed on the local community through grants to community groups.

The communities are not passive though. Through the grant process they inform what is needed and shape how it is delivered.

The community foundations' relationships with local groups and donors give them reach that is simultaneously wide-ranging and 'hyper local'. Funders value this reach.

As well as drawing in funds to deliver meaningful activity, community foundations help build the capacity of local groups so they will be there for the long run. Their approach is strategic.

In the UK there is no formal definition of a community foundation. It is their charitable objectives that help define them:

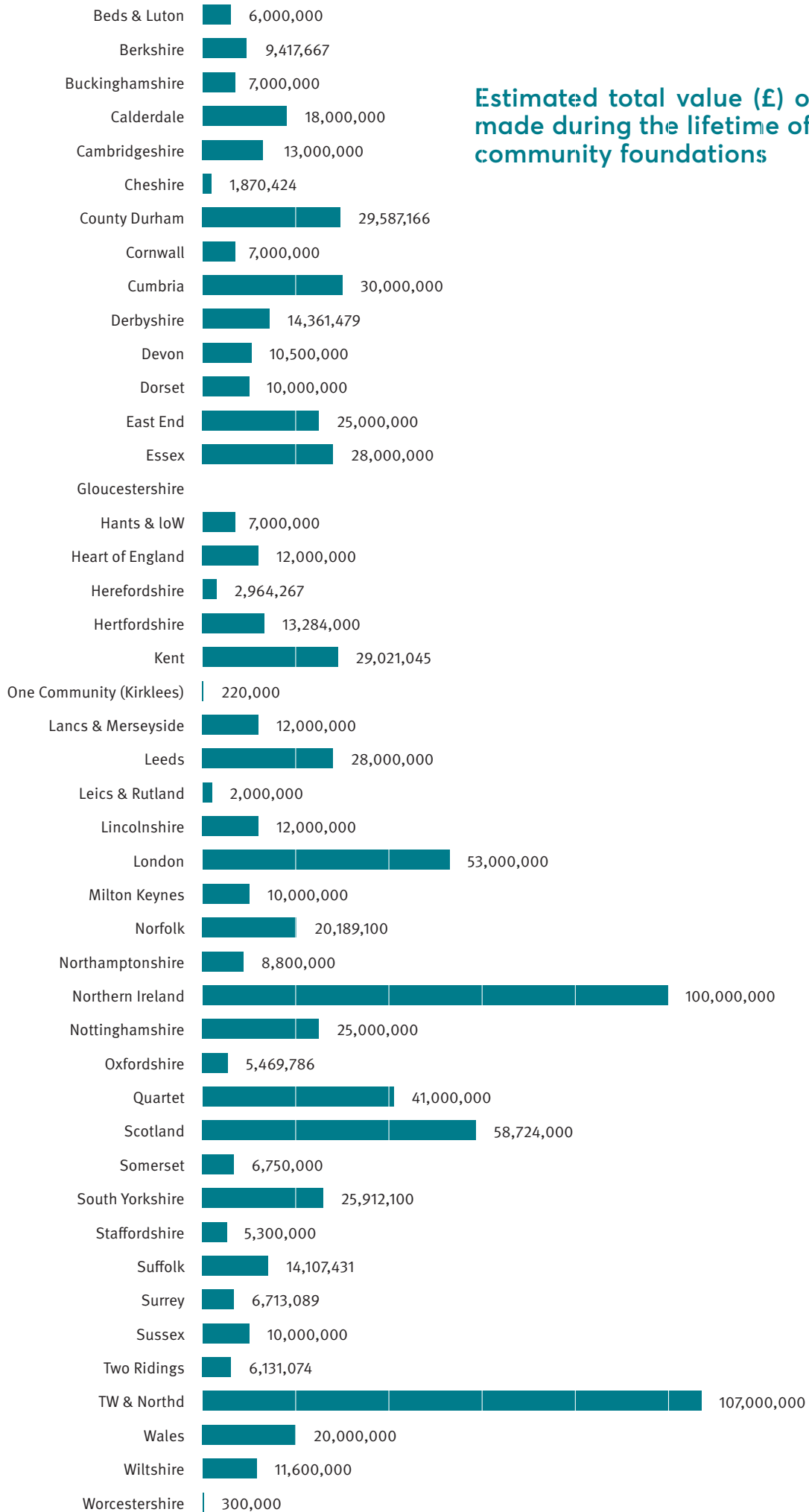
- A community foundation must be a registered charity
- The charitable objects have a specific geographic focus
- A community foundation makes grants to local charities and voluntary organizations

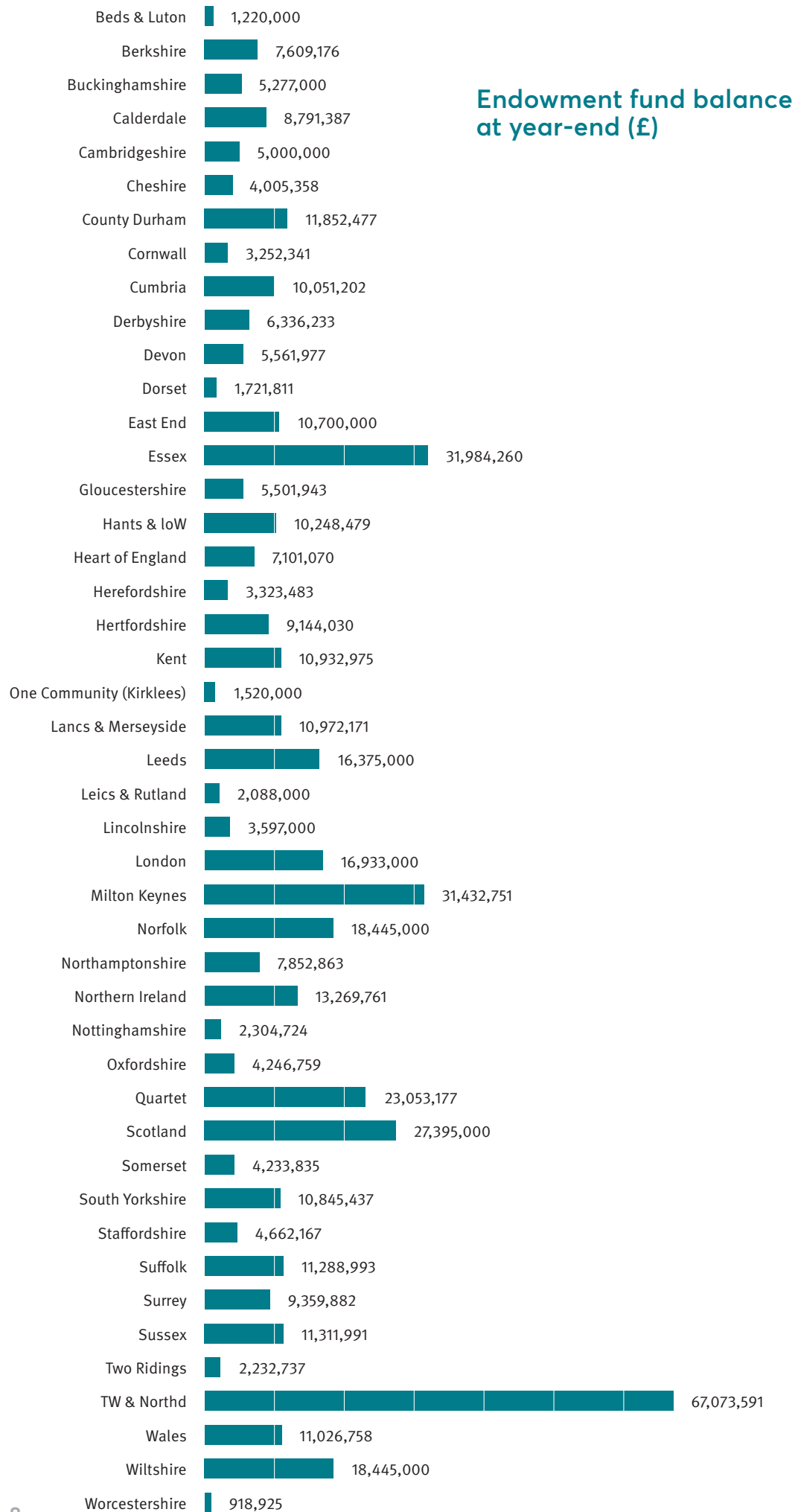
- A community foundation advises local charities and voluntary organizations
- A community foundation promotes local philanthropy
- A community foundation builds an endowment for the area

### Facts and figures – flashlight

- Grants made: £71.1m (2015 - 2016)
- Total endowment fund balance: £500m across the 46 member community foundations
- Of the 71.1 million distributed by UKCF member community foundations last year, £22 million was investment return on endowment and £50 million was flow-through funding
- Over the last ten years, £60 million in dormant and inactive trusts has been transferred to community foundations.
- Total number of grant recipients in the last year, across the network (organizations): 19,934
- Total number of grant recipients in the last year, across the network (individuals): 8,442
- Total number of funds under management in the last year, across the network: 3,801
- The average grant size is £3,200

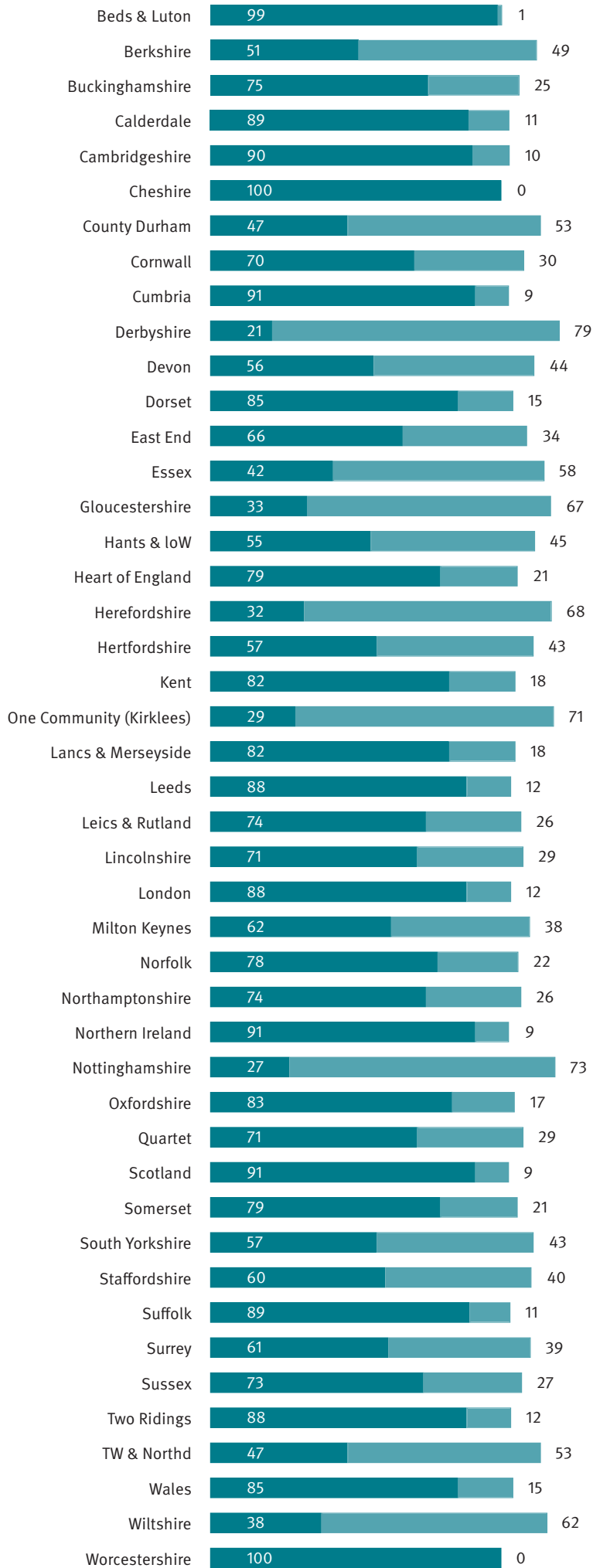
FACTS AND FIGURES







FACTS AND FIGURES



Value (%) of total grant-making in the last financial year from flow-through funds and endowment funds

■ Flow-through funds (%)  
■ Endowment funds (%)

# HISTORY

## History – development of a civil society and the community foundation movement in the UK

Europe is known for its traditions, and the UK is proud of its long tradition of philanthropy. Many of our grant-giving charitable trusts have roots in the guild system that managed each town's craftspeople. Religious groups are another part of the tradition, with many trusts established in the name of Christianity, and Judaism, Islam, Sikhism, Hinduism and Buddhism all having an impact. Some ancient trusts originally made their grants from the profit of a small patch of agricultural land. Some of this land is now located in cities and the endowment is worth millions. The Victorian philanthropist is the most vivid in our minds, with many schools, hospitals and homes built on the profits from the Industrial Revolution. The root of our public services is philanthropy: the National Health Service, free state education and our welfare state all began with people taking action to make things better.

Community foundations are part of this tradition of innovative people responding to local need. The largest in the world – Silicon Valley – echoes the Victorian era of philanthropists, though their wealth is generated from the information revolution rather than the industrial revolution.

There is one big difference between Victorian philanthropy and contemporary giving through community foundations: the grantmaking system. Local people are not 'done to' anymore. Through the grant application process community foundations ensure that delivery is informed by local people. And this is not just about what people are lacking or what they need. Grantmaking means local people's ideas can be implemented.

To elaborate: Mr Cadbury probably did not conduct community engagement when he built the town of Bournville for his chocolate factory workers in 1893. But in 2015 Barrow Cadbury Trust (an independent charitable Cadbury family foundation) placed great emphasis on engaging community groups. The New Beginnings grant programme reached community groups working directly with refugees. Funding was to help make refugees welcome in their new communities and grants were awarded to local groups based on what they felt would achieve this, be it food, parent and baby groups, IT training or something else. Priority was given to groups with refugee experience amongst staff and volunteers.

The national programme was managed by UKCF along with community foundations who aimed to reach groups working at a 'grassroots' level. This partnership enabled neighbourhood-level focus and a UK-wide approach. UKCF helped draw in other funders. UKCF also developed the application process, which was improved for round two following feedback from applicants.

Later, community foundations were able to publicise Barrow Cadbury's offer of media training to all applicants, whether successful or not. Furthermore, community foundations were often able to fund unsuccessful—but still valued—groups through other funds.

Community foundation programmes are delivered appropriately for the people benefiting, and often by local people themselves. Geographically based, community foundations know local groups and are able to make a strategic impact at a lo-

cal level. For this reason funders large and small want to work with us.

Until the 90's local funding often took the form of long-term funding for the everyday delivery work of charities and community groups. This usually required little in the way of an application process, monitoring or evaluation. This kind of funding is now largely a thing of the past. As charities adopted more businesslike practices, proof of impact increased in importance, especially when public money was allocated. Funding became more project-based with groups being awarded funding on the merit of each project proposal and anticipated outcomes and not just because they did 'good works'.

Now, public funding is used to purchase services that meet the needs of the local community. Charities are central to this, and are often key delivery partners for local councils and other statutory providers. In recent years these changes have been accompanied by cuts to statutory sector budgets, leaving many unable to offer the level of grant funding that they had previously. Many community groups relied on grant-funding and did not have the capacity to bid for or manage service delivery contracts.

The societal context considers these changes, demonstrates the importance of grants as part of the funding ecosystem and highlights the role of community foundations as facilitators of local funds and community benefit.

**1914** The first community foundation began in 1914 in the USA, in Cleveland, with Winnipeg being the first in Canada.

**1975** The UK's first community foundation is launched, covering Swindon and Wiltshire.

**1980's** Six more community foundations launch, with initial funding from the Charities Aid Foundation and the government.

**1991** The Charles Stewart Mott Foundation begins a decade of support for the development of community foundations in the UK and the 'Community Foundation Network' is established – now called 'UK Community Foundations' (UKCF).

**2001** Community foundations are chosen by the government to deliver a strategy to eliminate child poverty.

**2003–13** Community foundations distribute £50 million from the Big Lottery Fund 'Fair Share Trust' to 80+ communities and leverage £25 million in additional funding.

**2004–05** Community foundations start to work with Comic Relief, another large funder. Ten community foundations deliver the 'Time for Growth' initiative, raising £19.5 million from an original £1 million investment from Coutts & Co. the Esmée Fairbairn Foundation.

**2006–07** A quality accreditation scheme is established with standards endorsed by the Charity Commission for England and Wales. UKCF becomes a strategic partner of the government and community foundations are cited as effective funders by the government.



## CLOSE-UP

The Wiltshire Community Foundation was started by Joel Joffe, Nelson Mandela's lawyer during the 1963 trials. Made a stateless person by the apartheid government in South Africa, he came to the UK as a refugee and set up Hambro Life Assurance, which later became Zurich Financial Services. Joffe felt strongly that businesses should be involved in the local community and donate to voluntary sector organizations.

He started Thamesdown Community Trust in Swindon 1975, following the American model. This became the Community Foundation for Wiltshire & Swindon in 1991.

Wiltshire is home to Stonehenge and many white chalk horses (hence the horse logo). Its rural population 'look outward' to nearby cities Bath, Bristol and Oxford, and many services are provided by organizations outside the county. For this reason the Community Foundation are considering changing rules that say they can only fund organizations with a management committee in Wiltshire.

Wiltshire CF offers advice for community groups as part of the grants team's 'Funder Plus' service. There is no local Council for Voluntary Service (independent charities that co-ordinate and advise community groups) so the CF trains groups on governance and funding, and delivers an annual funding conference where big funders and community groups can meet one another.

In terms of endowment building, Wiltshire CF are experts in locating money already within the county and making it work harder: most endowment growth has come from transfers from charitable trusts that no longer operate, or no longer want to operate. For example the £4.6 million 'William Doc Couch Trust' was transferred from Wiltshire Council, and this endowment is now funding university scholarships.

In terms of flow-through funds and other income, Wiltshire deliver national programmes in partnership with UKCF. They also deliver a grant programme for the county's Police and Crime Commissioner (PCC) who funds activities for young people through the sale of unclaimed goods seized by police. The police also paid for the Community Foundation to assess grant applications for a million pound innovation fund.

Wiltshire CF also commissions work, such as the children's charity Barnardo's to deliver two schools programmes to build Wiltshire children's skills and self-esteem. This is part of an increasingly strategic approach, with a bigger grants making bigger impact.

Technology helps with this. The CF describe themselves as 'Digits super users'. Digits is the CRM information management system used by community foundations. Online meetings and decision making are also helpful in this large county.

The future sees more investment in philanthropy and legacies. Two new development directors are developing private philanthropy and legacy marketing and advice services. This work has already yielded a pipeline of £6 million from ten people with whom the community foundation has an established relationship, with, and many older people of all incomes are pleased to leave a legacy to the local area.

Dynamic Chief Executive Rosemary MacDonald is just back from shadowing CFs in Canada and is inspired by their marketing, which is timed to maximize giving at the end of the tax year. Expect more on the tax advantages of giving from Wiltshire Community Foundation in the near future.

**2008** Forty-five community foundations become local funders in the Government's Grassroots Grants programme, which comprises an £80 million small grants fund, plus a £50 million endowment challenge. In the same year the Leeds Community Foundation receives a donation of £10 million, the largest gift to a community foundation ever, from a local entrepreneur Jimi Heselden.

**2009** Community foundations are appointed to manage Comic Relief funds.

**2010** Community foundations run a UK-wide campaign for the first time ('Surviving Winter'). Over £2.5 million is raised to help more than 20,000 vulnerable people throughout the winter.

**2016** UK Community Foundations becomes a Crown Commercial Service supplier

## WHAT IS 'UK COMMUNITY FOUNDATIONS'?

UK Community Foundations represents all the accredited community foundations in the UK, providing a strong national voice for local philanthropy as well as managing UK-wide relationships.

Each Community Foundation has an in depth understanding of their local area, what the priority needs are and how best to address these issues. They are able to direct donors to fund causes that they are not only passionate about but that will make the most difference.

### UKCF VISION

Local philanthropy will be the norm and communities will be able to help all those in need.

### OBJECTIVES

- Grow a stronger and more cohesive network of CFs
- Have influence in the places where it matters
- Be properly resourced to achieve our goals

### VALUES

- Belief in communities and meeting local need
- Passionate about philanthropy
- Aspiring to excellence
- Committed to learning
- Adding value
- Demonstrating leadership
- Devoted to teamwork

UK Community Foundations currently has 11 staff, based in London. As a whole the network made £71.1m in grants in 2015-16. The average grant size is £3,200 and there is a total endowment of £500m across the 46 member community foundations.

UK Community Foundations enables the network to deliver large-scale and national grant programmes on behalf of large funders such as Comic Relief, the Lottery and the UK Government. In 2016, UKCF became an approved Crown Commercial Service provider.

UK Community Foundations organizes a national conference every two years, regular meetings between specialist staff roles, such as development or communications leads, and a biennial symposium.

It also manages the Beacon Fellowship awards for philanthropy, held every two years.





## TECHNOLOGY ACROSS THE NETWORK

Digits2 is a bespoke database on a Salesforce platform, which is used to create forms for grant applicants. As well as entering their qualitative information about their group and their project, groups select which high-level outcome they are looking to achieve. They then 'drill down' and decide on a primary outcome. Groups can also use Digits2 to upload accounts, required policies and even photographs.

Community foundations can see all the applications, and can shortlist them. They can draw data fields, such as group name and income, into grant assessment forms for each group. Grant assessors use these and then enter their final assessment onto Digits2. Community foundations use these as the basis for panel decisions about which groups to fund. Community foundations can then use Digits2 to send groups emails about the decision.

At the end of the programme, funded groups will report on how they have achieved their chosen high-level outcome qualitatively and quantitatively. the impact of the grants on individuals, and what has changed.

Of course all community foundations are separate charities. A handful, including England's largest, have their own systems that are right for them. However, those that use a different system also report back via Digits2 – even if they don't use it at the grant application process.

Centrally UKCF can see most of the data for national programmes (though not all – data is confidential to each CF). This capturing of data enables the network to report on its impact as a whole. It can reveal which (type of) beneficiaries have been helped in each area – for example young people not in education, employment or training. It can reveal the amount of funding in each area, and the proportion of small and large grants.

This all helps with reporting back to funders on the activities on the impact of what the money has achieved, demonstrating exactly what quantifiable change has occurred.

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» *For the first time we can say what we do as an entire network and show it in quantitative data and the close-up on the individual people, too.*

Lily O'Flynn, Senior Programmes Manager  
at UKCF

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# SOCIETAL CONTEXT – OPPORTUNITIES AND CHALLENGES

## The public, private and community sectors

The UK has clear terms for the public (statutory) sector and the private sector. The community sector, however, has had many 'rebrands'. These include Civil Society, The Charity Sector, The Voluntary Sector, The Voluntary & Social Enterprise Sector and The Third Sector.

Perhaps the breadth of it makes it difficult to define. The community sector includes entities from the biggest international charity to the smallest informal community group. Charitable organizations may have commercial arms, such as shops or even bus services. There are a growing number of community-led businesses including social enterprises and community-interest companies. The Localism Act has enabled the statutory sector to transfer assets such as libraries to local community groups. The Localism Act also enables community groups to take over commercial assets if they are considered important to the community. For example, the last shop in a village may be considered a community asset: that shopkeeper might provide the only human contact for an elderly person that day. So, is a private sector shop really all that different to a community centre?

There is a lot of crossover, and the three sectors frequently work together.

### How the sectors work together

UK local government consists of elected members in local wards (neighbourhoods). Then there are borough or county-wide councils. Some towns may also have a

town council. Recently our largest cities such as Bristol, London and Greater Manchester have elected an executive mayor. Other statutory services such as the police and the National Health Service also work on local, national and regional basis.

Each of these holds a budget to meet local need, which is identified formally through a process called commissioning.

Commissioning draws together data and expertise from council departments, police, prison and probationary services, health services and community and voluntary providers to understand what kind of service will meet local need. Organizations from any sector can then bid for contracts that deliver the desired outcomes on a borough, county or regional level.

Often the lead organization will work in partnerships with or sub-contract the work to community providers who have expertise that they do not. This will be central to their bid. In fact, some community foundations have been 'procured' by the statutory sector to deliver services. For example, they may have contracts with a local NHS Clinical Commissioning Group.

The Social Value Act requires public authorities to have regard to economic, social and environmental well-being in connection with public services contracts. However, added-value and long-term benefits may not always be accounted for, especially with austerity. Examples of these include local know-how and local employment and volunteering opportunities.

## The role of grant funding

Larger organizations are often well-resourced to develop bids. However they may not be the best at delivering services. Meanwhile, community organizations delivering amazing services find the barriers to being 'procured' too high.

So how do these groups sustain their important work?

**A grant from the statutory sector** – usually for a project, sometimes towards core costs such as salaries and rent.

**A grant from a foundation, trust or other charity** - usually project-based.

**A grant from a fund pot where various funders contribute.** This may include funds from trusts, charities, the private sector or individual philanthropists, and is based on criteria agreed by all the funders. An example of this is the Youth Social Action Fund currently being delivered by community foundations across the UK.

Community foundations help design, promote and monitor all these types of grants. This is their day-to-day work. Some have the resources to support groups with applications. Most are able to identify suitable groups and encourage them to apply. Many hold grant application workshops, identify where the group can improve their policies and other support to build the capacity of the groups.

In the UK this capacity-building work with smaller and newer groups was frequently done by the local council, or a 'council for voluntary service' (CVS), which are in-

dependent charities that advise community groups. CVSs and councils also distribute grants. However, following government cuts, fewer grants are distributed through these channels, and some council community departments and CVS's have closed.

**Earned income.** Charities with a trading arm can earn income, such as from a café, shop or services such as landscaping or delivering paid-for training courses.

In fact, 'payment by results' is a kind of earned income that is increasing in popularity, but working capital is needed and this can be too much of a risk for groups.

**Donations.** A 'no strings attached' donation is most welcome! Donations help sustainability by funding rent and salaries. Donations also free groups from delivering externally defined outcomes. They can innovate. This can draw in further investment.

Donations come via individual philanthropists and givers, workplace fundraising and corporate social responsibility. They may come from the interest on an endowment.

**Community foundations fund those with an excellent track record, build the capacity of less established groups, support innovative ideas, and work with others to ensure a strategic approach to local need.**

With their knowledge of local groups and ability to work with a wide range of funders, community foundations are well placed to facilitate funding opportunities. They are like bakers, creating bread (grants) from raw ingredients (funds) to nourish local people.

Of course the community foundation must maintain a supply of ingredients to attract funds through their development work. For the bread to rise, in other words for the funds to get bigger, the community foundation must build an endowment. The legal and financial context expands on endowment building.

Of course, not all support is financial. Volunteering is vitally important to community groups.

## Volunteering

Everyone has something to offer, though not everyone can offer money.

Volunteers are an asset. Funding application forms increasingly ask about this 'in-kind support'. This Asset Based Community Development (ABCD) model emphasizing what a group can bring rather than what they lack. For example, although volunteers by their nature are not paid, some funders value volunteering at £13 an hour.

Volunteering is good for the volunteers themselves. The UK is increasingly alert to the well-being benefits of giving time or money. For example, giving is one of The New Economics Foundation's evidence-based Five Ways to Well-being: **Connect, Be Active, Take Notice, Keep Learning** and **Give**.

This relates to an increased UK focus on mental health. Community groups are proving their vital role in reaching people with stress, anxiety and social isolation that are impacting on their mental health. By supporting people to get more exercise, be out in nature, meet others, face debts, earn

more, eat better and enjoy life, community groups are making a huge impact on people's well-being. This kind of work is where many community foundation funds are directed.

Often the local doctor is unable to help with these issues. In fact, there is an emerging 'trend' called Social Prescribing, where GP practices direct people to community groups and volunteering opportunities. This can save the statutory sector significant sums of money. For example, the Department for Work and Pensions and the Cabinet Office recently estimated that the well-being value to frequent formal volunteers themselves is around £70 billion per year.

## Philanthropy

Philanthropy is central to the work of community foundations and most have one or more staff dedicated to developing and supporting philanthropy. Philanthropy is well understood by community foundations, so examples are included here rather than an explanation.

Community foundations are keen on philanthropists to work with one another, be as strategic as possible, and really maximize the impact of their giving. Dedicating their time as well as their money is much appreciated too. Diversity is increasing as well. More women, people from black and minority ethnic backgrounds, young people and people with moderate wealth are all dedicating funds and professional skills to their local community via their community foundation. Visible giving is also encouraged: people who see someone like them giving are more likely to think that philanthropy is for them too.

### Here are some examples of UK philanthropy:

**Tom Ilube** is a tech entrepreneur and cyber security expert. He was voted number one on the Powerlist of the most influential people of African and African Caribbean Heritage 2017. Through his involvement in a London secondary school and founding of a girls' science and technology school in Ghana, he hopes to support genius – after all, one in 25,000 people has the brain power of Einstein.

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» *In a world of extremes and populism, the power of philanthropy is that it can and will continue to support causes, places and people that no one votes for.*

Tom Ilube

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**Iman Monawar Hussain** is the founder of the Oxford Foundation. His school programme helps young people explore identity and faith and avoid exploitation, equipping them to advocate against violent extremism.

**Helen Wilde** and her husband Peter represent the averagely well-off philanthropist. On retirement from their professional jobs they were happy to realize that they had enough to support themselves and their community. They are an example of what retiring baby boomers can offer to philanthropy.

The young philanthropist is still unusual. **Ben Hanford** works with the Norfolk Community Foundation to engage young philanthropists through 'The Norfolk Futures Fund'. Young professionals each donate £25 a month. With its events and opportunities to share skills with charities, this highlights the transformation of philanthropy from 'something someone else does' into a visible sociable activity for most people.

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» *Just imagine at key points in your life you had taken a different path, or luck or chance had dealt you a bad hand. It would be great to know there were people out there who cared and were in a position to make a real difference.*

Ben Hanford

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**David Eric Laing** supports the Northamptonshire Community Foundation with time, skills, funds and in-kind donations, helping build an endowment that has seen the foundation triple in size. David was chair for nine years and has left the community foundation in extremely good stead – by donating a four-story building.

'First stop – contact your local community foundation', is David's advice for budding philanthropists.

**Mike and Carol Clare** worked with the Heart of Bucks Community Foundation to identify what investment would make the greatest local impact. The answer was a venue ac-

commodating 22 charities with plenty of space for indoor and outdoor events in the 12 acres of grounds.

**Sarah and Francis Salway** work with the London Community Foundation on the 'Building Communities in Coldharbour' programme in Brixton. Francis is the former CEO of Land Securities, and the couple's focus is on engagement between developers and communities. Since Francis became chair of London Community Foundation the endowment has increased threefold.

**Jane Wates OBE** Jane was originally a trustee of the Berkshire Community Foundation and helped set up the Oxfordshire Community Foundation. She continues to help ensure a joint approach by the two foundations. Jane is part of grant decision-making committees and impact measurement. She has commissioned work to improve her understanding of how to help, for example a report from the Young Foundation about the best way to support residents of a local housing estate.

**Michael Campbell** was instrumental in launching the Hampshire and Isle of Wight Community Foundation. He was chair for seven years and remains a generous donor, giving vital funding for everyday running, which makes a huge difference in a world of project-based funding.

**Pat and Susan Russell's** investments and intense working life meant they could retire early and turn their skills to making a social profit. Their endowment fund is managed

by The Community Foundation for Calderdale whose donor care plan helps the couple see the direct impact of their giving.

**Dr Iain MacRitchie** supports the Foundation Scotland. Dr MacRitchie understands that good ideas need promotion and travels the country to expand the reach of his mentoring scheme. He shows how being profit-driven in business can translate into seeking social 'profit' in communities.

**Grant Gordon** works in Scotland through The Childhood Trust and Cabrach Trust. Grant is a strong promotor of philanthropy with a consultative approach. His work is helping the next generation of philanthropists to access the tools and advice they need to give effectively and with impact. His interests are focussed on supporting people to enjoy a safe and happy childhood.

We hope this illustrates the diversity of philanthropy in the UK and the increasing focus on supporting philanthropists to be strategic and work together to increase, and improve, their impact.

# CLOSE-UP

## Community Foundation for Northern Ireland

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» *The rest of the UK has much to learn from Northern Ireland, about how to create social capital, to build communities, to persuade communities to work together, to create social enterprises, to sustain and strengthen civil society as well as how to resolve conflict.*

John Nickson, Trustee of UK Community Foundations

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Belfast remains home to some of the most deprived areas in the UK. The shipyards used to employ 36,000 people and then 'Belfast was hit by a perfect storm: de-industrialization, redevelopment and the troubles. The storm left behind a swamp and we cannot get out of it without help. The effort to get out of the swamp means that different communities have a common interest', says Jackie Redpath, chief executive of The Greater Shankill Partnership.

These insights are from 'Our common good,' by John Nickson. Nickson locates the Community Foundation for Northern Ireland centrally in the peace process: everyone agreed that disadvantage needed addressing, and the Community Foundation has been doing so in an inclusive way since 1979.

The community foundation began as The Northern Ireland Voluntary Trust, a government endowed trust, and changed its name in 2002. It was set up by Peter Melchett, a government minister.

Being locally based, the Community Foundation was better able to navigate nuances and identify need than a big funder or gov-

ernment funder. Committed to peacebuilding, social justice and effective community development, the Community Foundation works in partnership with communities, encouraging them to be proud of who they are and what they have achieved.

Avila Kilmurray, - chief executive from 1994–2015, championed the importance of including ex-prisoners (who on release had become community leaders) in the peace process. This helped build relationships. As Nickson puts it, the Community Foundation helped 'create the space where people could pick up a phone rather than throw a brick.'

In her early career Kilmurray set up a women's refuge – the first in Northern Ireland. At the time Direct Rule meant that no local policies arose. Local activism such as this helped respond to need. 'That was why the community and voluntary sector became so powerful', says Kilmurray.

Transparency helped 'buy-in' from all communities. 'The refuge looked after women from both sides, we made a point of that. It was more difficult when a couple of British army wives turned up. So we went round all the armed groups to tell them what we were doing. They left us alone.'

When she moved to the Community Foundation, the same transparency and fairness was evident. There was a 50/50 split between Catholics and Protestants on the board, on funding committees, among the staff and in the allocation of grants. All groups sat on the board, including paramilitaries. This meant that each side made decisions about which groups from the other side should be funded.



The emphasis was on funding outreach community development. For example, encouraging people to set up parent and toddler groups 'that no paramilitary god-father would take over'. Kilmurray found these groups successful in both republican and loyalist areas.

Much of the funding came from the EU and from American philanthropists (from 1991–2014, Atlantic Philanthropies made 21 grants to the Northern Ireland Community Foundation, totalling \$30.1 million.)

Because of this philanthropy, unlike most other community foundations in the UK, there was little emphasis on raising donations locally. This is changing, though local donors are hard to find. The challenge today is to build donor support now that statutory funding is so much less. There has to be more emphasis on growing private philanthropy', says Kilmurray.

Social enterprise and community ownership is emerging as one way local people are contributing to their community.

For example, with a £20,000 grant from the Community Foundation, Philip Dean and Adrian Birth created a community-based garage with a mixed workforce of Protestants and Catholics. Later they set up a self-built company in partnership with the Community Foundation, the Northern Ireland Housing executive who donated land, and Ulster Garden Villages, who loaned £130,000 to build nine houses. The company trained ex-prisoners and young people regardless of religious background.

After 2.5 years they owned three houses worth £0.75million, sold one and bought a pub and taxi firm – all in community ownership.

It didn't all go perfectly, but a new company called Resurgam was formed when the old one was dissolved and two community centres and more property were added to the community portfolio along with 104 sustainable jobs. Community ownership means there is real 'buy-in' from local people, these businesses are thriving and are not vandalized, while others are closing down.

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» *Philanthropy from outside Northern Ireland and community philanthropy from within made peace possible.*

John Nickson, Trustee of UK Community Foundations

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Most recently, with new chief executive Andrew McCracken at the helm, the Community Foundation has highlighted that there are 13,000 millionaires living in Northern Ireland living alongside 376,000 people living in poverty. The New Beginnings programme has helped refugees, for whom the country is a place of safety. There is increasing focus on mental health and education. A Big Lottery-funded Space & Place Programme will fund capital projects that bring communities together to identify a shared vision for their area and work together to deliver it.

The Community Foundation wants to use their experience to develop a culture of giving based on relationships rather than transactions, facilitating organizations as well as local people to give to local causes, with the Community Foundation acting as a key connection between donor and recipient.

## LEGAL AND FINANCIAL CONTEXT

Community foundations are charities under the Charities Act 2011 which states that a group of individuals or an organization claiming charitable purpose must be able to demonstrate public benefit. This built on the 2006 act which helped reduce bureaucracy for charities. All community foundations demonstrate public benefit.

There is no specific UK law that states what a community foundation is. It is the defined charitable objectives that qualify a charity as a community foundation:

- The charitable objects include a specific geographic focus
- A community foundation makes grants to local charities and voluntary organizations
- A community foundation advises local charities and voluntary organizations
- A community foundation promotes local philanthropy
- A community foundation builds an endowment for the area

This section looks more closely at each of these objectives in the financial and legal context, and the tools community foundations use to guide and regulate their work.

### Geographical focus

Northern Ireland, Scotland and Wales each have one community foundation. In England community foundations tend to follow county boundaries. This means that each community foundation covers a large geography and population.

There are approximately 8 million people in London, 800,000 in each English county, 1.8 million in Northern Ireland and 3.2 million in Wales. There are 5.4 million in Scotland,

which is about the same population as a US state or Scandinavian country. Suitably, Foundation Scotland have two offices.

In the UK poverty is not based on geography. Wealth and poverty live side by side and poverty is mostly hidden. For example, 24% of Westminster, London children live in severe child poverty.

To identify need and communicate it to potential funders, many community foundations use 'Vital Signs' and other reports.

'Hidden Dorset' reveals the largest population of older people in England and Wales, high levels of young people not in education, employment or training, particularly in rural areas and 13 areas within the 20% most deprived nationally. These priorities are addressed through the Dorset Fund. This is particularly useful in areas with more pronounced wealth, when issues are not common local news.

In contrast, deprivation in Wales is high on the news agenda but wealthy individuals are harder to find, so The Community Foundation in Wales focusses their energies on identifying and supporting potential funders.

Meanwhile Community Foundation for Northern Ireland's 2016 Vital Signs report identified that local people were most concerned about health, education, employment and poverty, which led the Community Foundation to make an additional £500,000 available for local communities. The report also called for greater collaboration between the funders and the voluntary sector – allowing these key areas of need to be tackled more effectively.



# VitalSigns®

## Vital Signs

Vital Signs is an initiative where Community Foundations identify the key issues affecting local communities. It is a global initiative, with community foundations in countries such as Canada, Brazil and the UK taking part.

Each year, Vital Signs reports are published to provide a full picture of social trends, community needs and what people think of the places where they live and work. The reports are based on a combination of existing research and surveys with local residents.

## Milton Keynes Community Foundation's Vital Signs 2016 report

**HELPING MAKE MK A BETTER PLACE TO LIVE AND WORK**

**WHAT IS VITAL SIGNS MK?**  
Vital Signs MK is an annual report designed to reveal top area research on the community of Milton Keynes and present it in an easy-to-read format. Vital Signs MK is our strength and in the challenges we face as a city. The first Milton Keynes report, covering Greater Milton Keynes, is published every three years. During the year, in between, a shorter Vital Signs Update report is published.

**WHAT IS MK COMMUNITY FOUNDATION?**  
Milton Keynes Community Foundation is a leading grant-making Milton Keynes charity with over 30 years of experience. We support people and organisations to improve the quality of life in Milton Keynes. Our Vital Signs publishing programme is intended to inform, to seek discussion and to support our work in bringing about change in the community. Vital Signs also helps us to support local charities and voluntary groups by enabling us to offer further information and more practical grant making and property related programmes. With the help of local people and businesses in the last financial year, we were pleased to offer £3.7 million of support to local community groups and charities, making MK a more vibrant place for all of us to work and live. Vital Signs helps us to ensure that our support is focused on areas most in need in the community. To find out more about our support, visit [www.miltonkeynescf.org.uk](http://www.miltonkeynescf.org.uk) or call us on 01908 589272 for local news.

**STRONG COMMUNITIES**

When a community grows quickly over as being packed as Milton Keynes has, it can be a real challenge for that community to remain open, welcoming and accessible to all. In the year's Vital Signs MK Community Survey, a large majority of the local population (80% reported that they have developed a real sense of belonging here and over 90% felt as if they should recommend living here to a friend who was considering it. The Young Communities' theme seeks to capture and highlight the actions that foster a sense of belonging, local and engagement between local people. Strong Communities are more cohesive and less vulnerable, with members of the community able to rely on one another more.

**VITAL THINKING**

While there has been continuing to rapid growth for the Milton Keynes, how best can our communities accommodate the new arrivals, while maintaining good levels of community engagement and activity? How do we ensure newcomers are not left out and are happily engaged with their new residents and getting their involved in their communities?

**VITAL ACTION**

The Home, the Heart National awareness charity, HOME2020, delivered an awareness project in Milton Keynes that supported active participation in voting for adults with learning disabilities. The project brought together the charity's staff with local schools and specialist organisations working for local elections, sought their own advice and expressed their views on the issues that affect them before being supported to visit their own votes, engaging fully with the democratic process.

**VITAL STATISTICS**

- 75% Three-quarters of local people try to get involved in local events and activities.
- 4 out of every 5 MK residents report that they feel a sense of belonging here.
- 80%
- 7%
- Between 2016 and 2026, Milton Keynes' total population will grow by 75%.
- Only a third of the MK electorate cast their votes in the May 2016 election.
- 33.7%
- Milton Keynes is the 4th fastest growing district in the UK outside of London 2004-14.
- MK population is projected to grow by almost one fifth over the next ten years.
- 19%

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## Grantmaking to local charities and voluntary organizations

This is the backbone of our work and is conducted in a similar way across all the community foundations in the UK.

In terms of the law, community foundations can fund registered charities, voluntary groups such as tenants associations, parents' groups or 'Friends of the Park' groups. Community foundations can make payments to individuals, usually in a crisis affecting many, such as large flood or fire. This would be done in partnership with local community groups. Community foundations can also fund social enterprises or community businesses. (The legal structure of these vary and legal organizational terms include Community Interest Company and Company Limited by Shares.) Grant programmes may be one-offs, very local, county-wide, country-wide, national or European. UKCF often support larger funds, with Salesforce database technology enabling a consistent approach to application and monitoring processes.

A community foundation promotes grant programmes, receives applications, assesses shortlisted applications and conducts due diligence. A panel make decisions about which groups to award. Grant panels may include the funder and other stakeholders as well as Community Foundation representatives. There are usually different panels for different programmes. Each must be constituted in accordance with the community foundation's rules.

The 'Spirit of 2012'-funded Fourteen programme illustrates innovative practice by having local people consider need and

decide how to respond. The aim is to create a legacy of community participation, well-being and happiness. How the programme is implemented varies across the fourteen groups, which include rural, urban and seaside communities (UK seaside resorts are particularly deprived since 1970's international package holidays). Each panel aims to tackle disadvantage by supporting opportunities in sport, physical activity, culture and the arts, volunteering and social action. Each panel is supported by their local community foundation over the three year funding cycle. This is a learning curve for all involved!

## Community foundations advising local charities and voluntary organizations

The UK has a wealth of online capacity-building resources about how to be an effective and legal charitable entity. Bespoke advice is much rarer (a victim of funding cuts).

There is debate amongst community foundations about to what extent they should offer bespoke advice. Some prefer to focus solely on building endowment. Some are paid by other agencies to deliver advice. Some delivering 'for free' as it helps achieve their aims. Some would like to but do not have the staff capacity – community foundation staff numbers range from one full-time role to 28.

However, all community foundations provide advice through the grantmaking process. For example, to qualify for a grant award, a group must have the right policies, such as an equal opportunities policy, and must

have at least three unrelated management committee members. This is a type of capacity building advice especially when groups will be awarded a grant on the condition that they develop their policies.

### Promoting local philanthropy

The level of charitable giving is high in the UK. Tax laws help charities in three main ways:

- Charities are not liable for business rates, though this may change in future
- Charities do not have to pay income or corporation tax. (They do pay Value Added Tax on purchases like stationery. Charities do not pay VAT on grants, though they might need to be VAT registered if delivering contracts or paid-for advice.)
- Gift Aid

With Gift Aid, charities can claim tax already paid by the donor. When making a donation a UK tax-payer can stipulate that the charity can recover any tax already paid on that amount. Gift Aid is set at 25% of the gift and applies to donations of assets as well as money gifts. For each £1 donated, the charity can claim £0.25 from the government.

Gift Aid enables charities to assure the donor that 100% of their donation reaches the beneficiary (if running costs are covered by the 25% Gift Aid).

In addition, those that pay tax at the higher rate can claim the difference between the higher rate and the basic rate. So the donor gets the tax back on the total donation to the charity. (Example: you donate £100 to

charity. The charity claim Gift Aid at the basic rate to make your donation £125. However, you pay the higher rate of 40% tax, so you can personally claim back £25.00 (£125 x 20%).) This applies to income or capital gains.

Community foundations usually offer bespoke advice for philanthropists and donors. This may be charged for via a commercial arm, owned and controlled by the charity, not for private profit, and for defined charitable objectives.

### A community foundation builds an endowment for the area

Of the £71.1 million distributed by UKCF member community foundations in 2015-2016 £22 million was investment return on endowment and £49 million was flow-through funding.

Community foundations can spend money on fundraising activities, but it is important to understand that most obtain funds through major gift fundraising. In the UK, community foundations do not place emphasis on community fundraising. Emergency situations would be the only circumstances where this might take place. It is very rare for community foundations to deliver their own projects, and they tend not to fundraise for this.

Most funds for grants programmes that come from companies, charities and government are flow-through funds. Funds not committed to flow-through grants are dedicated to building endowment for the area. An objective of endowment building is essential to pass UKCF-managed quality

assurance. Though there is no minimum amount by law, all community foundations in the UK have an endowment of above EUR 50,000.

These endowments come in the form of Family foundations, named funds and transfers of dormant trusts.

### Named funds

The UK model for community foundations' endowment is named funds: a donation to a community foundation by an individual, normally a minimum of £25,000, is placed into an endowment in their name. Gifts made from that endowment are in the name of the donor. The fund bears the name of the donor for as long as there is money in it. The donor can be as involved as they want.

The Leeds Community Foundation received £23,000,000 from Segway inventor Jimi Heselden, which was distributed in Jimbo's Fund grants of £20,000 to projects focussed on health and children and young people.

### Dormant trusts

Interestingly, the UK has a large number of 'dormant trusts' that have helped build endowment for community foundations. The Charity Commission has an interest in all the trusts it regulates being efficiently administered and has supported UKCF work with community foundations to identify and then transfer dormant assets to community foundations. Over the last ten years, £60 million in dormant and inactive trusts has been transferred to community foundations.

This allows for trusts to be repurposed. For example, a trust for 'impoverished farm workers' in an area that is now urban must find new beneficiaries.

In addition, trusts may still have existing beneficiaries, but be managed more efficiently by the community foundation. For example, if all the trustees are elderly and can find no one to replace them, they can ask the community foundation to manage the trust.

## Tools of regulation

### Charity regulation

In England and Wales, the Charity Commission, a government department, independently regulates charities. In Northern Ireland the Charity Commission for Northern Ireland was established when the Charities Act (Northern Ireland) 2008 became law. Similarly in Scotland, the Charities and Trustee Investment (Scotland) Act 2005 places a duty on the Office of the Scottish Charity Regulator (OSCR) to encourage and assist charities in meeting the requirements of charity law.

These regulators register eligible organizations as charities and ensure legal requirements are met. Their public information about each registered charity is used during community foundation due-diligence procedures on grant applicants. Each regulator also provides online services and guid-

ance on effective charity management, with OSCR emphasizing encouragement of charities, the Charity Commission for Northern Ireland emphasizing charity development, and the Charity Commission emphasizing its role in public confidence in supporting charities.

### Media scrutiny

Recent years have seen an increasing press scrutiny of financial management within charities. There has also been scrutiny of the percentage of donations that reach beneficiaries (especially for national and international charities) and the marketing techniques used to ask for donations. There is a current focus on the management of personal data.

### The Fundraising Regulator

The Fundraising Regulator supports the Code of Fundraising Practice outlining the standards expected of all charitable fundraising organizations across the UK. It covers: Key Principles and Behaviours; Working with Volunteers; Working with Children; Working with Third Parties; Fundraising Communications and Techniques; Direct Marketing; Reciprocal Mailing; Telephone; Digital Media; Trusts; Major Donors; Corporate Partnerships; Raffles and Lotteries; Fundraising through Payroll Giving; Events; Public Collections; Static Collections; Legacies; Payment of Fundraisers; Handling of Donations.

Major donor relationships are regulated by the Fundraising Regulator, which defines 'Major donor' as an individual or family with the potential to make or procure a gift which would have a significant impact on the work of the organization.

Of course trustees undertake due diligence on the financial and reputational dealings of potential partners before donations are accepted. More information about major donor fundraising is available in the Institute of Fundraising Major Donor guidance.

### UKCF Quality Accreditation 4

Quality Accreditation was introduced to the UKCF network in 2007. It was an initiative that was supported by members as it defined what a community foundation is and should be doing.

Every community foundation is independently assessed against agreed standards every three years. This supports CFs to demonstrate how they have developed and confirms that members included in a proposal have the capacity and capability to deliver.

It provides protection for the 'Community Foundation' brand as it identifies and helps to provide support to any community foundations with significant weaknesses.

It also identifies excellent practice to share any common issues to address. Within the These are the standards:

**A community foundation:**

1. is an independent charitable philanthropic organization serving a defined geographical area that builds an endowment to meet needs in local communities with evidence of philanthropy-based business and financial models
2. has a broad-based board that follows and works towards good practice in charity governance
3. has a comprehensive strategic 3-year plan, as well as an annual business plan. Relevant structures are in place to ensure corporate effectiveness and resilience, and there is evidence of effective stakeholder engagement and feedback
4. complies with relevant legislation and codes of practice, and adopts good employment practices and embraces equality and diversity in all aspects of its work. It has an agreed set of key documents, policies and procedures that are reviewed on a regular basis
5. complies with financial reporting requirements and maintains accurate financial records and controls. It makes effective use of IT systems for production of key financial management data and reports
6. has policies for investment of funds and a supporting financial strategy
7. continually seeks philanthropic funding from a broad range of donors to build endowed and flow-through funds, and has a business management model based on philanthropy
8. can provide a customized service to donors which respects their charitable interests, meets their needs and offers opportunities to involve donors in different ways; there is a robust framework for new donor recruitment and the management of relationships with existing donors
9. has a clear focus on needs and impact analysis to help inform its future direction; operates a broad range of grant programmes that meet identified community needs and demonstrate impact
10. publicizes grant programmes and seeks to reach all sections of the community. It can demonstrate understanding and involvement in social issues and has an engagement framework that helps it to communicate with all its stakeholders
11. can demonstrate clear purpose; direction and goals; is able to evidence ambition, focus, prioritization; impact on social causes; is a community leader in the local area and is an active member of the UKCF network



## CLOSE-UP

### The Community Foundation in Wales / Sefydliad Cymunedol Yng Nghymru

Set up in 1998, the Community Foundation has eight staff. All their work is done in two languages. 'We live and breathe bi-lingualism in Wales', they say. Grantmaking is well over two million in a year and the original endowment has grown from £800,000 to £13 million.

Their focus is providing a businesslike service for philanthropists to access in the same way as they do other professional advice services.

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» *We are here to advise on philanthropy. We are professional, people trust us. We come across like their other advisors such as accountants, wealth managers and lawyers.*

Tom Morris, Finance, Research and Grants manager.

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Six years ago CFIW created the Fund for Wales – an endowment fund where everyone can be a philanthropist. So far they have received donations between £50 and £590,000 and the Big Lottery generously gave a £1 million match challenge.

In the South Wales valleys there are a strong legacy of deprivation and high rates of youth unemployment. Meanwhile Wales has a low percentage of millionaires compared to England. But a sense of belonging helps attract funders. People love Wales and want to give, even if they have moved away. In fact the Community Foundation often have to go to London to secure endowment funds from Welsh philanthropists. Perhaps some of these are experiencing –

Hiraeth – a unique Welsh word describing a bittersweet poetic longing for home.

The Community Foundation make an annual trip to the USA, meeting lots of American people that also love Wales.

The Community Foundation in Wales hold an annual Wales-wide philanthropy week which celebrates the fact that they are the only country in the world with their own endowment fund (as far as they are aware).

They may also be the only community foundation that counts locally made jewellery and wool blankets amongst its merchandising, with 30% of the profit from these local products going to benefit Welsh communities through the Fund for Wales.

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» *We're so pleased that Melin Tregwynt woolmill are working with us to help build this unique national community endowment fund, the Fund for Wales. Melin Tregwynt is a national treasure of Wales with customers across the world who love Wales, so it seemed a perfect partnership. The Fund for Wales enables everyone who cares about Wales to join their donations together to help people working at grassroots level to achieve lasting change in their own communities.*

Sian Stacey, Development Manager at the Community Foundation in Wales

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More information can be found in their publication *A Portrait of philanthropy in Wales*.

# BEST PRACTICE EXAMPLES



## Flood response 2016

» *Disaster relief is a key role of community foundations.*

Andy Beeforth, Cumbria Community Foundation

Humans are more than sixty percent water. We are attracted to water, and most humans live near rivers which provide water for agriculture, drinking and leisure. Rivers' natural tendency to flood is good for the soil but causes huge damage to contemporary towns, cities and agricultural sites. In this context, floods are dangerous.

In December 2015 and January 2016 storms Desmond and Eva caused flooding across the UK including areas in Scotland, North Wales and the North and Midlands of England. Community foundation staff cancelled their time off and sprung into action. Local appeals were supported by a central appeal by UK Community Foundations.

The government provided match funding for England, and the Scottish and Welsh government also contributed significant funding.

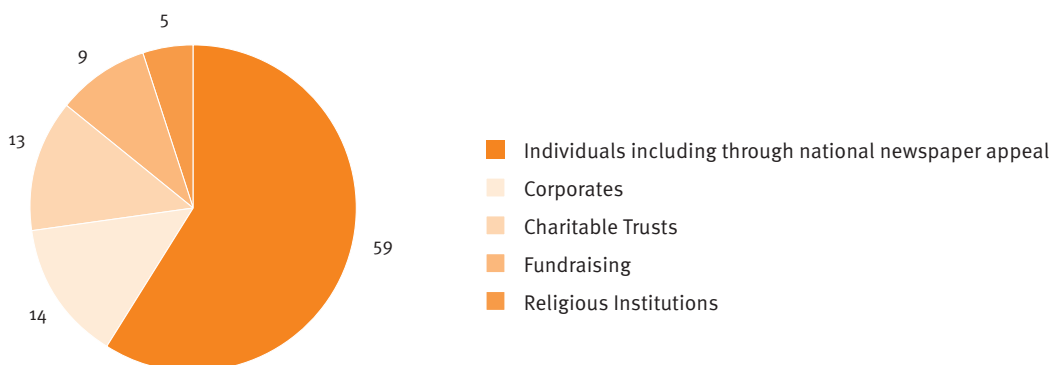
The combined appeal raised £17.2 million.

Although the timing of the 'Boxing Day Floods' was a huge challenge, the 'How could this happen to people at Christmas' factor was a positive for publicity and fund-raising.

Responses came from the national government, local councils, businesses, the public and funders. Nine community foundations managed the process of distributing money.

The funds were awarded in grants to over 16,100 affected households. Initial sums of £250–500 helped individuals enormously. Community groups and local charities also received funding for themselves and for redistribution. In some areas small businesses received support as part of ongoing flood resilience endeavours.

**Illustration of donors to Cumbria Community Foundation flood appeal by proportion (before match funding by statutory sector).**







This local cooperation and co-ordination means that communities are increasingly well prepared to respond to disasters.

In this context, Community Foundation for Calderdale provides an example of good practice.

### Community Foundation for Calderdale

The area experienced severe flooding in 2001, 2008 and 2012. Storm Eva dispelled any illusion that such flooding was a rarity. It affected 3,000 households and left 350 families displaced. Nine hundred businesses were flood affected and hundreds of people were laid off from work (and suffered loss of earnings). A high proportion of small independent businesses in Calderdale highlight that local business is not separate from community.

The Calderdale Flood Fund raised over £3.3 million. Part of this was used to develop resilience tools and keep the floods on people's radar:

**Calderdale Rising** – A crowdfunding initiative which attracted 103 flood-affected business participants.

**Plugging the Gap** – A locally-led insurance scheme which allocated £5m to support flood-affected businesses as long as they could provide 1:1 match funding. Community Foundation for Calderdale put forward applications for ten local businesses, attracting £93,500 to help them get back on their feet.

**Flood Save** – A saving scheme in partnership with Calderdale Credit Union primarily for small businesses not covered by the government insurance scheme. The Community Foundation match-funds the first £2,000 and the money is available following a flood event. The Community Foundation has invested £500,000 from the flood fund to underpin the scheme.

**WATERMARK** – A campaign to build a resilience fund for future flooding. WATERMARK is a brand applied to a product, service or event – such as a plumbing service, an item on a restaurant menu or a music gig. The business – or charity – donates a proportion of the profit from the branded item to a central pot. Businesses, charities, local residents and visitors can all get involved. The fund is managed by the Community Foundation for Calderdale.

WATERMARK stickers, posters, gin, beer, tea towels and bags add to the brand. There are a free newspaper and a pop-up shop sponsored by a local solicitor firm.

#### The Watermark campaign and branding:

- Provides a focus for flood-related advice and local giving
- Attracts philanthropic giving and fund-raising events
- Gives everyone the chance to participate
- Communicates the message that 'Calderdale is open' for visitors and tourists.

To date, the scheme has involved 27 businesses and £300,000 has been raised.



The Community Foundation for Calderdale won the Fundraising Campaign in the Third Sector Awards 2016 for their work raising £3 million.

» *After the Boxing Day Flood we felt it was important and right to harness our unique community relationships to directly support businesses and create 'strategic resilience' initiatives that both stimulate the local economy and generate regular donations from the public and the local business community to grow a Flood Fund in readiness for a future flood.*

Steve Duncan, CEO of the Community Foundation for Calderdale

## Supporting innovation

The Nottinghamshire Community Foundation recently held its tenth 'Dragons Den' event. The High Sheriff of Nottinghamshire, Judy Naaké, joined forces with five other female business leaders to award successful enterprise ideas a grant of up to £3,000.

Budding entrepreneurs of all genders apply for a grant to support their business development. To be considered for a grant, applicants had to be a resident of Nottingham city or county, submit a realistic business plan and have a great enterprise idea.

The Angel Panel included representatives from the Nottinghamshire Community Foundation, local businesses, University of Nottingham and the Nottingham Trent University Business School.



» *I am very keen to support new entrepreneurs as I know how hard it is to build a business. I believe the advice and support from this panel of successful women will offer the applicants an incredible boost to their start-up, as well as a memorable day in the den.*

Judy Naaké, The High Sheriff of Nottinghamshire

One of the winners was Duwayne Watson who set up college and sixth form parties for people too old for youth clubs and too young for nightclubs.



## Royal London Local Charity Partner Programme

Royal London is the largest mutual life, pensions and Investment Company in the UK, with Group funds under management of £84.5 billion. Founded as a Friendly Society in a London coffee shop in 1861, Royal London started out with the aim of helping people avoid the stigma of a pauper's grave. Since then Royal London have been helping people help themselves and are committed to delivering the best value for customers and putting members first.

Royal London believe it's important for businesses to support their local communities. In 2016 their community engagement programme moved to a local approach. Engaged staff chose an aim, to support people with a chronic or long-term condition, which strongly aligns with Royal London's business as a life and pensions provider. Supported by UKCF, twelve Community Foundations nominated a suitable local charity partner working to fulfil that aim. This is one for each of Royal London's main offices.

Royal London made a generous donation to the core costs of each local charity. It is hard to fundraise for core costs such as salaries for permanent staff. This kind of funding helps charities concentrate on what they do best: delivering services.

The case studies are included here as they illustrate the range of people served by the charities funded by Community Foundations in the UK.

## BERKSHIRE, WEST BERKSHIRE THERAPY CENTRE

The West Berkshire Therapy Centre has provided exercise and therapy to people with mobility problems since 2014.

The vital help received can be life changing. Margaret has suffered a series of medical problems that resulted in numerous operations, incomplete recoveries and overlapping setbacks for several years. The effect was very demoralising and she stopped going out, in her own words 'I sat there and waited for my time to pass'.

Then her daughter heard about West Berkshire Therapy Centre and literally dragged her along to have a look. Margaret, who was convinced that no one could help her, has seen a great improvement in physical strength, her general outlook, confidence and social life.

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» *For the first time in a very long time I'm now making plans, have ordered a passport and am booking a holiday, the first I will have had in years – it's changed my life!*

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### CALDERDALE, BASH LOCAL

Dave is a 55-year-old man who had been living on a run-down boat. We helped Dave with forms and he was given a property. We put electric on for him and delivered a food parcel.

But Dave struggled to pay his bills and feed himself, wanting to return to a 'simpler life' on his boat. Due to the onset of osteoarthritis he was unable to meet Jobcentre requirements. His money was stopped. We continued our support, ensuring Dave could access a hot meal and drink every day.

Dave was admitted to hospital. On his release his daughter rang Bash Local. We made sure he had fuel and food, clean clothes and new shoes – he was getting wet feet. We helped him with forms, and after a long process of assessment and appeals he was granted benefits.

Dave's life changed for the better – he's able to budget, keep on top of his bills and buy food. Dave used our services for thirteen months whilst he got back on his feet. Now he calls in to keep us updated and signposts others who may need our services.



### CHESHIRE, JUMP CHILDRENS CHARITY

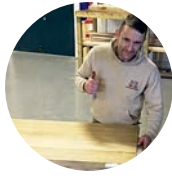
Sienna is six and has a very rare genetic condition affecting the development of her major organs and resulting in many challenges including gradual loss of sight. Sienna stays in Alder Hey Childrens Hospital for major surgery.

Sienna and her parents enjoyed our Christmas Memory Day and were delighted with the gift of a Christmas Memory Book.

In 2013 Sienna's dad was diagnosed with cancer. We were gave the family a further Memory Book. Sadly, he passed away before Christmas. Sienna and her mum were devastated.

Sienna's mum kept in touch with JUMP and told us just how much the memory books helped Sienna with grieving for her dad. Each night she looks at the photos of her and her dad and she speaks about him positively with her mum.

Sienna's life is likely to be short and her mum is determined that she will have the positive experiences that other children have. The memory books provide evidence of this, and both Sienna and her mum have become supporters of JUMP and attend events when they can, to contribute in order to support other families.



### COUNTY DURHAM CORNERSTONE SUPPORTED HOUSING AND COUNSELLING

Kevin, a 38-year-old man, was released from prison following a life of substance misuse and crime.

While attending the Cornerstone Supported Housing and Counselling Training Centre he used his joinery skills to make a small table. Cornerstone's therapeutic environment aided his recovery. After a short time he was trusted with workshop keys and supported to live independently.

Drug free, Kevin set up his own Narcotics Anonymous meeting. He is studying towards a social care qualification, runs smaller groups for professional drug and alcohol organizations and helps children not attending mainstream school. He has been back in prison, but this time as an ambassador for recovery.



### DERBYSHIRE, SPECIALIST STROKE SERVICES

Two weeks after having her first baby Diane had a stroke – she was 28. A 'banging headache' turned out to be a brain haemorrhage. 'It felt like the end of the world', Diane says. 'I was trapped.' Within a year her marriage ended and Diane had to leave behind the farm and shop she had built up and move into an adapted bungalow. More devastatingly, she had to leave her one-year-old son behind as she was unable to care for him.

Diane describes coming to Derbyshire Stroke Centre as the event that changed her life. She needed support with communication as she couldn't read, write or speak. Positive role models from our young stroke survivors helped her be more optimistic. We helped Diane relearn skills to keep her independent. Now she gives one-armed cookery lessons to other stroke survivors.

We supported Diane to take care of her son her own, and he even stays with her one night a week. This is a huge milestone. It is a privilege to see Diane go from strength to strength over the last six years. Diane says:

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» *If it wasn't here my life would be over, this place has given me a purpose. I loved it from the moment I got here. I now volunteer in the gym, I'm a trustee and I'm responsible for the garden.*

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### COVENTRY, COUNDON CARE CENTRE CHARITY

Ron Price, 94, has been coming to the Centre since 2003. After his wife died he was very lonely – his only son lives in South Africa. Ron's neighbour Helen suggested to him that he might like to come to the Centre and make new friends of his own age.

To start with, Ron was very reluctant but he soon came out of his shell. He made friends and joined in all the activities including singing and outings to the seaside. He enjoys a pint when we have a trip out for lunch and was keen to tell us about Coventry City Football Club – he's a loyal supporter.

As Ron aged his mobility was affected and a carer now attends him at home every day. He is getting quite confused but still enjoys the minibus ride to the Centre. It is wonderful to see him smiling, feet tapping and hands clapping when music is played. His son pops into see us when in England and is so grateful for the care we give. He gives us great compliments and is so happy that Ron is still able to enjoy his days at the Centre.

Ron remains popular with staff, volunteers and members!

### LONDON, DOORSTEP HOMELESS FAMILIES PROJECT

A diabetic mother, seven months pregnant and with a six-year-old daughter, was referred to us for help and support. She had come from abroad, had separated from her husband, had no recourse to benefits and was destitute and depressed. We were able to provide her with food, clothing, furnishings for her room, toys for her child and help with fares to health appointments.

At first she did not allow her daughter to attend our play activities as she felt mistrustful, but gradually we won her trust and she is like a totally different person now. She has given birth to another daughter and now makes full use of all our services on a daily basis, including the crèche, after-school club and the summer programme. Both mother and her older daughter have formed supportive friendships with other adults and children in the hostel. She says:

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» *Just one thanks is not enough. I wish God give you back everything. Many thanks, respect.*

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### NORFOLK, THE BUILD CHARITY

Tom, in his 30s, is learning disabled and visually impaired. He lives with his aged parents – his principal carers. Threatening incidents towards him had led to Tom becoming reclusive. He would not leave the house and initially rejected opportunities offered through BUILD Charity as it meant mixing with people.

Tom was persuaded to join in a gardening and farming project – a small supported drop-in where he could work at his own pace. He had control. He then joined a social club with people he felt safe with, heritage and cultural activities and a Sunday Lunch Club. He formed a personal relationship, and plans to move to supported accommodation with his partner using independent living skills acquired through the BUILD Charity's Skills for Life programme.

Due to BUILD and their amazing friendly volunteers Tom's world has expanded and he is no longer living in a high state of anxiety. His family enjoy seeing him happy and can now begin to participate in outside activities themselves.

### DERRY, FOYLE PARENTS AND FRIENDS ASSOCIATION

Donna Maria has attended activities at Foyle Parents and Friends for over three years after leaving school at 19. She has studied music and digital arts with her peers and had the opportunity to DJ, sing, move to music, socialize and learn valuable life skills.

The most important thing for Donna Maria is keeping in touch with her friends as she can feel isolated at times. FPAF provides her with the opportunity to maintain those positive relationships in a creative, fun, progressive environment. Her mother says:

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» *Foyle Parents and Friends Association recognized her potential and cognitive ability, and enabled her to grow and develop respectfully.*

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This link is to a video of music featuring Donna Maria and her best friend, Sorcha. Sorcha is a volunteer at FPAF and a previous classmate of Donna Maria's.

<https://www.facebook.com/tunedinproject/videos/738237373008185/>





### BATH, BATH CITY FARM

Peter, 67, volunteers at Bath City Farm. Difficult events, including relationship breakdown, family estrangement and untreated bipolar disorder led Peter to self-medicate. Feeling isolated and lonely, Peter attempted suicide. Following time in psychiatric hospitals, Peter was brought to the farm and immediately felt the staff helped and understood him.

Peter feels fresh air and exercise is getting him fitter. He gets a great deal of satisfaction from weeding and seeing the fruits of his labour – beautifully planted flower and vegetable beds. Peter enjoys fundraising for the Farm and has sold plants at all the produce markets. Peter says:

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» *I had completely lost confidence and my life was closing in on me ... the commitment I have made every week makes me feel really proud and I have claimed my confidence back.*

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### EDINBURGH, THE OPEN DOOR

Doreen is a cheerful 88-year-old who loves to chat and sing. She struggles with preparing meals or dressing herself independently, lives alone and has no family nearby.

Doreen has made many friends at The Open Door. One telephones her every evening, which makes her feel loved and less alone.

Her epilepsy, asthma, arthritis and heart failure have meant lots of time in hospital. But she has not been alone. Staff and volunteers from The Open Door have visited Doreen.

Doreen was unhappy with her accommodation – she shared a building with vulnerable adults with substance misuse issues and often felt frightened. The Open Door referred her to an advocacy organization, who helped her move to a sheltered housing complex with social activities where neighbours drop in and Doreen feels truly at home. Doreen says:

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» *I don't know what I would do or where I would be without The Open Door. It's my life.*

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### CARDIFF, 4WINDS USER-LED ASSOCIATION

J was struggling – he was depressed, had a gambling addiction and associated problems with alcohol, managing money, looking after his physical health and maintaining a daily routine. He was socially isolated and had no contact with any family members. He had lived for 27 years in a privately rented bedsit in an overcrowded house with shared facilities and an abusive landlord.

J had negative experiences of other support services. He described arriving at the centre feeling as if he'd entered, like Alice, into a dark deep tunnel, not knowing what was at the other end. But, like Alice, this opened up a whole new world for him, where he began to see hope and opportunity.

Since accessing the centre six months ago, J has moved to a supported flat, become better at budgeting and managing his health, enjoys regular socializing and has turned into an engaging member of the centre. The opportunity to both give and receive support has increased J's confidence and he is becoming an 'involvement champion' for 4Winds.

## URLs and REFERENCES

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- The Economic Value of Volunteering  
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<http://www.wiltshirewhitehorses.org.uk/>
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<https://en.wikipedia.org/wiki/Hiraeth>

## List of community foundations that are members of UKCF

- Bedfordshire and Luton Community Foundation
- Berkshire Community Foundation
- Buckinghamshire Community Foundation
- Community Foundation for Calderdale
- Cambridgeshire Community Foundation
- Cheshire Community Foundation
- Cornwall Community Foundation
- Cumbria Community Foundation
- Foundation Derbyshire
- Devon Community Foundation
- Dorset Community Foundation
- County Durham Community Foundation
- East End Community Foundation
- Essex Community Foundation
- Gloucestershire Community Foundation
- Hampshire and the Isle of Wight Community Foundation
- Heart of England Community Foundation (covers Coventry, Warwickshire, Solihull, Birmingham & The Black Country)
- Herefordshire Community Foundation
- Hertfordshire Community Foundation
- Community Foundation for Northern Ireland
- Kent Community Foundation
- One Community Foundation (the community foundation for the people of Kirklees)
- Community Foundation for Lancashire
- Leeds Community Foundation (includes Bradford)
- Leicestershire and Rutland Community Foundation

- Lincolnshire Community Foundation
- London Community Foundation
- Community Foundation for Merseyside
- Milton Keynes Community Foundation
- Norfolk Community Foundation
- Northamptonshire Community Foundation
- Nottinghamshire Community Foundation
- Oxfordshire Community Foundation
- Quartet Community Foundation
- Somerset Community Foundation
- Community Foundation for Staffordshire
- Foundation Scotland
- Suffolk Community Foundation
- Sussex Community Foundation
- Community Foundation for Surrey
- Community Foundation in Wales
- Community Foundation for Wakefield District (Associate Member)
- Community Foundation Tyne & Wear and Northumberland
- Wiltshire Community Foundation
- Worcestershire Community Foundation
- Two Ridings Community Foundation (North & East Yorks, York & Hull)
- South Yorkshire Community Foundation

## ABOUT ECFI

The European Community Foundation Initiative (ECFI) is a network housed at the Association of German Foundations in Berlin. Our partners (UK Community Foundations, Initiative Bürgerstiftungen, Centrum pre filantropiu in Slovakia) work throughout Europe.

### OUR VISION

Our vision is a vibrant community foundation movement contributing significantly to citizens' engagement in local philanthropy and civil society in Europe.

### OUR MISSION

Our mission is to promote, develop and strengthen the community foundation movement in Europe.

### OUR BELIEFS

We believe in community foundations as a vibrant form of civil self-organization. As foundations created for citizens by citizens, they are evidence of a strong and engaged civil society, contributing significantly to the local resolution of important social issues. Their capital endowment contributes to the sustainability of efforts on a local level. Infrastructural support is well-suited to promote the quantitative and qualitative development of community foundations as demonstrated by national organizations (e.g. UK Community Foundations in the United Kingdom or the Community Foundation Initiative in Germany).

### OUR STRATEGIC PRIORITIES

- We strengthen community foundation associations and support organizations in Europe and their local community foundations by providing and stimulating networking and peer learning opportunities.

- We listen to the needs and challenges of community foundations and provide a platform for exchange, development of relationships and stimulate collaboration on pressing common issues.
- We build and share knowledge on community foundations in Europe in cooperation with field researchers and partners.
- We amplify the voice of the community foundation movement in European space and collaborate with partners on issues based advocacy.
- We leverage additional financial and other forms of support.

### OUR OFFERS

- In collaboration with associations and support organizations we map the field of more than 600 community foundations in Europe. This data collection provides additional information about needs and challenges in the different European countries.
- We offer a cross-border peer learning program which addresses the needs of leading individuals in the field of community foundations in Europe. Our written reports synthesizing local results provide a useful tool that is made available to anyone interested in community foundations.
- We organize a European conference for community foundations every two years.

Join our network:

[info@communityfoundations.eu](mailto:info@communityfoundations.eu)

For more information:

[www.communityfoundations.eu](http://www.communityfoundations.eu)

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Robert Bosch **Stiftung**



**Lipoid**Stiftung



