



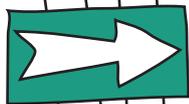
HOORAY!

**SUPPORT US**

- BECOME A MEMBER
- MAKE A DONATION
- ESTABLISH A FUND
- LEAVE A LEGACY

HOORAY!

**Cumbria Community Foundation**  
 Dovenby Hall, Dovenby, Cockermouth,  
 Cumbria CA13 0PN  
 Tel: 01900 825760 • Fax: 01900 826527  
 Email: [enquiries@cumbriafoundation.org](mailto:enquiries@cumbriafoundation.org)  
 Website: [www.cumbriafoundation.org](http://www.cumbriafoundation.org)  
 Registered Charity No 1075120 • Limited Company No 3713328

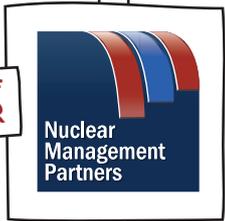


CONNECTING PEOPLE  
**WHO CARE**  
 WITH CAUSES  
**THAT MATTER**



HOORAY!

SPONSOR OF THE YEAR

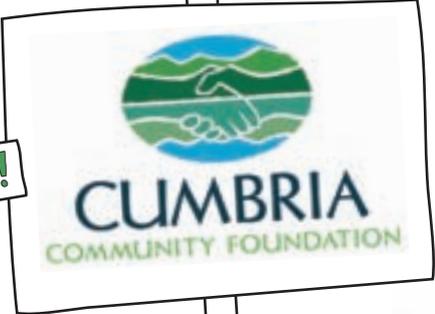


HOORAY!





HOORAY!



HOORAY!

10TH ANNIVERSARY  
REVIEW & REPORT  
2009

HOORAY!

1999

2009

HOORAY!

CELEBRATING  
**10 YEARS**  
SUPPORTING  
CUMBRIA'S  
COMMUNITIES



# KEY ACHIEVEMENTS

## In 10 years the Foundation has

- Given out over £11.5m in grant aid
- Awarded 4,505 grants to 2,500 groups
- Awarded 2,458 grants to individuals
- Built our long term funds to £5m
- Established 57 Funds

## We are supported by

- 51 Fund holders
- 155 Corporate & challenge members
- 154 Individual & family members
- 51 Voluntary sector members

1999

2009



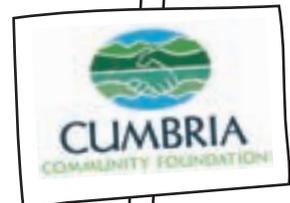
*Growing Well Ltd., Low Sizergh Farm - a social enterprise for adults with mental health problems*

**HOW  
WE DO IT**

**We do it by**

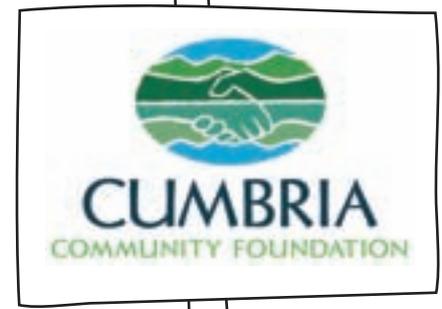
- Raising money from individuals, businesses, charitable trusts and public bodies
- Distributing that money in the form of grants to local charities, community groups and individuals
- Managing grant making funds on behalf of donors
- Promoting giving in the county

**CONNECTING PEOPLE  
WHO CARE  
WITH CAUSES  
THAT MATTER**



**HOORAY!**

**1999**



**HOORAY!**

**2009**

**CELEBRATING  
10 YEARS  
SUPPORTING  
CUMBRIA'S  
COMMUNITIES**

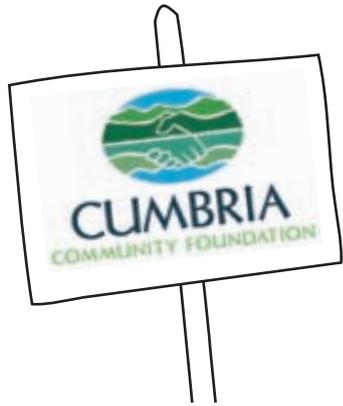


**CONTENTS**

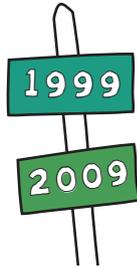
- 4** Chairman's report
- 5** View from the director
- 6** Foundation milestones
- 10** Connecting people who care with causes that matter
- 14** Barrow Community Trust
- 14** Cumbria ProHelp & team volunteering
- 15** Grassroots Challenge update
- 15** New funds
- 15** Environmental projects
- 16** Corporate membership 2009
- 18** Grant making 2009
- 20** Giving and membership
- 21** Trustees and staff
- 22** Financial statement 2009
- 23** Acknowledgements

Front cover photo: Eden Mencap celebrate the Foundation's 10th Anniversary with a street party (Photo courtesy F.C. Wilson and The Cumberland & Westmorland Herald)

Back cover photo: Foundation Trustees Shirley Williams (left) and Elaine Woodburn (2nd right) with Monkway School's Learning mentor Anne Banks (centre) and Breakfast Club pupils and friends (Photo courtesy Cumbrian Newspapers)



# CHAIRMAN'S REPORT



I am pleased to introduce the Community Foundation's Annual Review for the first time.

The Foundation has been very successful in a challenging year for all charities. Community needs have been rising, whilst sources of income, such as donations and investment returns, have struggled to keep pace during the recession.

We are very fortunate in Cumbria that so many groups and individuals continue to work so hard to put something back into their communities. The Foundation's 10th Anniversary events have been good opportunities to recognise the vital work of volunteers and the outstanding contributions of past and present trustees, staff and supporters. Special thanks go to my predecessors, John Fryer-Spedding and Peter Hensman, and to our Director, Andy Beeforth.

We continue to look for and attract new funds to extend our help to Cumbria's varied communities. Cumbrians have responded very well to the Grassroots Endowment Challenge appeal but we have a lot more to do to meet the target of £1m by March 2011. We are extremely grateful to the

nuclear industry for their trust in the Foundation to manage sizeable new funds, particularly Nuclear Management Partners for the £2.5m Community Fund and British Nuclear Fuels for the £500,000 Live the Dream Fund. Thanks also go to the trustees of the Mary Grave Trust who have entrusted us with the stewardship of that Trust.

I look forward to the Foundation's next ten years being at least as successful as the first ten years and thank you all for your support.

**Bob Mather**

**WE CONTINUE TO LOOK FOR AND ATTRACT NEW FUNDS TO EXTEND OUR HELP TO CUMBRIA'S VARIED COMMUNITIES.**

## Abbeytown Pre-School

received £400 in 2000 towards the refurbishment of three portacabins that would become their new purpose-built building. They have since become a highly successful, committee-run Pre-school.

Manager Linda Morrison told us *'The Pre-school is very important in the village and the children just love coming here. They walk through the door smiling.'*



The refurbished portacabin at Abbeytown Pre-School

# VIEW FROM THE DIRECTOR



HOORAY!

CONNECTING PEOPLE  
WHO CARE  
WITH CAUSES  
THAT MATTER



In the summer of 1999 I was offered the position of Director at the not yet launched Cumbria Community Foundation. I was hesitant about accepting the job. I wasn't entirely sure it was something that would work in Cumbria, but it seemed like a great idea and potentially a really good thing for the county.

The vision of the founding trustees was to create a new grant making charity that would enable people and businesses to help strengthen their communities by providing them with a means of 'giving back.' They were particularly keen to see the creation of a growing invested or long term fund that would be a sustainable source of grant making income.

What has been hugely gratifying is that people have chosen to give through the Foundation. We have built our long term funds to over £5m and in our ten years invested over £11.5m supporting local charities and people in need.

What is most important is that our donors' money has made a difference to the lives of people who really need it. This review tells the story of the people who have given and the people who have received.

We have been fortunate to have the chance to play a part in the life of Cumbria's communities and to touch the lives of people in genuine distress. I sincerely hope that in reading the Review you consider how you might make a difference to people in need in our communities.

Andy Beeforth

WE HAVE BUILT OUR LONG TERM FUNDS TO  
OVER £5M AND INVESTED OVER £11.5M  
SUPPORTING LOCAL PEOPLE IN NEED.

**Cumbria Action for Thyroid Sufferers** now known as the Cumbria Advisory Thyroid Service (CATS), was started in Windermere by June Kasavan and Moyra Marshall. Since receiving a £400 grant in 2000 to help the group in its start-up phase, CATS has grown and gained a national reputation, becoming a registered charity in 2004, the year June sadly passed away. The group will receive the Queen's Award for Voluntary Service this year which is a fantastic achievement.

CATS co-founder Moyra told us *'When we first started we were told support groups were ten-a-penny and that we wouldn't receive community support, but we're still going strong!'*



Founding CATS member June Kasavan (centre) with original members



# FOUNDATION MILESTONES: THE JOURNEY SO FAR...



**December 1997:**  
**First meeting at Mirehouse**  
convened by John Fryer-Spedding to discuss the idea of creating a Community Foundation for Cumbria.



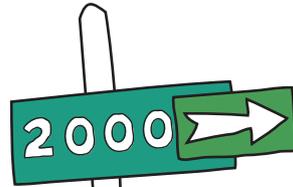
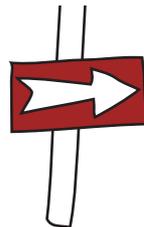
*Founding Fathers: John Fryer-Spedding (centre) and Arthur Sanderson (left) with Foundation Director Andy Beeforth*

★ **August 1999:**  
**Foundation launched**  
with a founding pledge of £1m from BNFL and contributions from all seven local councils towards initial running costs.



*Brian Watson, Head of Site, BNFL Sellafield, hands the founding donation to James Cropper, John Fryer-Spedding (right) and Andy Beeforth (left) (Photo courtesy Cumbrian Newspapers)*

**November 1999:**  
**Francis C Scott Charitable Trust Challenge**  
The Trust pledges to donate £250,000 provided the Foundation raises a further £500,000 in 18 months to build long term funds. The challenge is met in February 2001.



**January 2000:**  
**First grant awarded**  
to Steps Grief Support for children and young people in Furness.

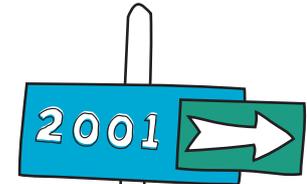
**February 2000:**  
**First legacy received**  
**George Kipling**  
A £125,000 donation from the estate of George Kipling is used to create the Kipling Funds, two long term funds benefiting the elderly and children and young people.

**March 2000:**  
**First Corporate Fund**  
The Cumbrian Newspapers Group donates £100k to set up the CN Group fund.

**May 2000:**  
**West Cumbria and Furness Key Fund launched**  
Our first major grant programme. West Cumbria secures European funding but there is no mechanism for community groups to access it. Local partners contribute £150,000 to match £150,000 of European funding and the Key Fund is created.



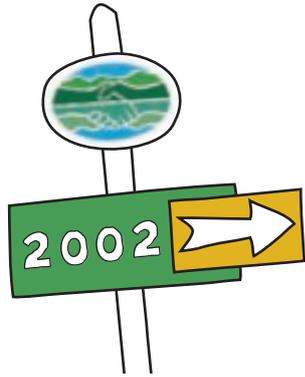
*Launch of the Key Fund with Lord Inglewood (front)*



★ **April 2001:**  
**Foot and Mouth Recovery Fund launched**  
Cumbria experiences more than 40% of the UK's Foot and Mouth cases. The Foundation responds by raising £2.14m to help individuals and communities affected by the crisis. The Cumbria Community Recovery Fund makes its first grant on the 11 April, just 7 days after the appeal is launched. In total, the Fund makes 1077 hardship grants to individuals and families, 313 grants to community groups and awards £150,000 to support longer term projects.

**August 2001:**  
**Allerdale Community Fund launched**  
The Foundation establishes its first local authority fund in partnership with Allerdale Borough Council which has since distributed over £500,000.





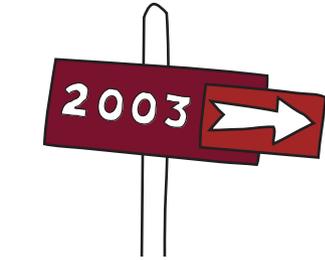
**April 2002:**  
The Coalfields Regeneration Trust establishes the West Cumbria Coalfields Community Chest.

**May 2002:**  
**Individual and Corporate Membership Schemes launched**  
Local people and businesses join the Foundation as members, supporting its work and participating in its governance.

★ **June 2002:**  
**UK Charity Awards**  
The Foundation wins the prestigious 'Fundraising Campaign of the Year' Award for the Cumbria Community Recovery Fund launched in response to Foot and Mouth.

**September 2002:**  
**Business Buddies Scheme launched**  
Business volunteers are recruited to assist community groups with their professional skills. Rebranded ProHelp, the scheme has now helped over 200 organisations.

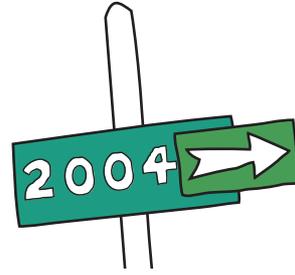
**December 2002:**  
**Barrow Community Trust launched**  
Barrow's own Trust Fund is launched by the Mayor of Barrow in the dry dock at the Dock Museum.



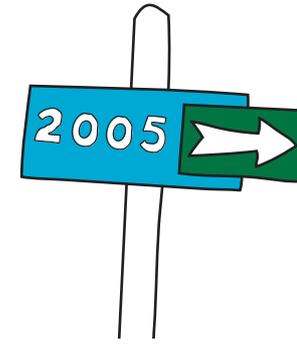
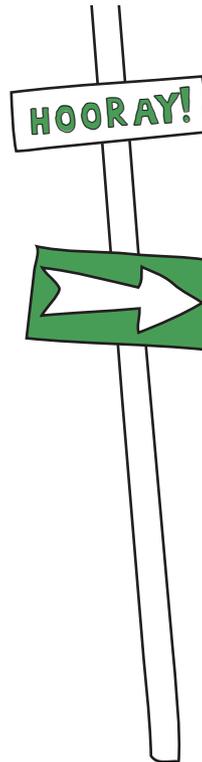
**September 2003:**  
**Allerdale Youth Bank launched**  
The Foundation starts to develop a new generation of philanthropists. Young people design and run their own grant programme and have so far made 81 awards totalling £32,000 for a range of activities.



*Youth Bank planning residential*



**November 2004:**  
**Partnership agreement signed with Mary Grave Trust**  
The Foundation begins to provide services to the Trustees of the Mary Grave Trust, administering travel bursaries for young people from low income families in West Cumbria.

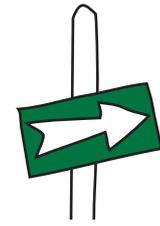


★ **January 2005:**  
**Flood Recovery Fund launched for victims of storms and floods**  
A second emergency appeal, this time in response to the storms and floods which hit Cumbria in January 2005. The Cumbria Flood Recovery Fund raised £805,000, helped 475 households and gave grants to 26 projects.



*Elderly people hit by the floods (Photo courtesy Cumbrian Newspapers)*

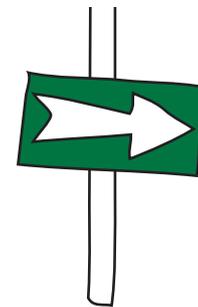
*'It's only £10, it is all I can manage... but send it with my heartfelt sympathy for all who have suffered in this catastrophe.'* An elderly donor



*'Your Foundation has been a lifeline for many displaced and troubled families, individuals and small businesses who would have struggled without your support.'* Carlisle resident



*Grants Officer David Andrews accepts a donation from the Storm Team to the Flood Recovery Fund*



# FOUNDATION MILESTONES: CONTINUED...



*'The difference the grant will make to our life is fantastic. It gives us faith in the human race after how much we lost.'* Flood victim

*'One of the best features of the Foundation is that people find that they are not alone or forgotten by the community at large and that gives real measure of comfort.'* Keswick resident.



Emergency services help flood victims in Carlisle (Photo courtesy Cumbrian Newspapers)

**February 2005:**

**Partnership agreement signed with Holehird Trust**

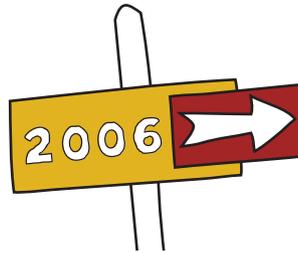
The Foundation begins its ongoing relationship administering grant making for the Holehird Trust in the former county of Westmorland.

★ **June & July 2005: Charity Finance and UK Charity Awards**

The Foundation's Flood Recovery Fund wins the top UK award for grant making in the UK Charity Finance Awards and 'Fundraising Campaign of the Year' in the UK Charity Times Awards against tough competition from national charities.



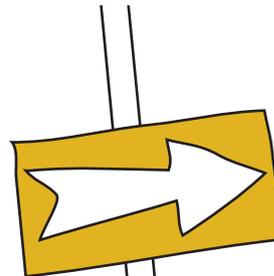
Trustee Susan Aglionby (centre) and Vice President Arthur Sanderson (right) accept the UK Charity Award



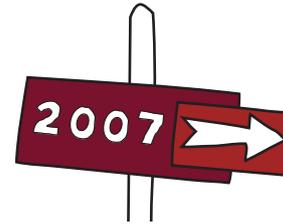
**September 2006:**

**Environment Fund launched**

A donation of shares from an anonymous donor establishes a new fund aimed at raising awareness of the effects of climate change and addressing environmental issues by supporting grassroots organisations.



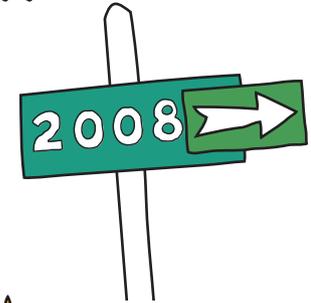
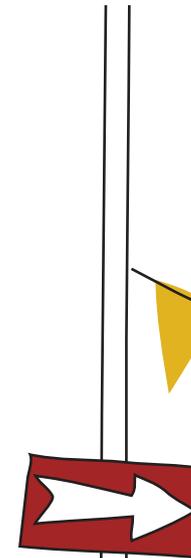
**HOORAY!**



**March 2007:**

**Foundation hosts International Conference on Disaster Response**

Dovenby Hall hosts delegates from Europe and North America to develop the first toolkit for Community Foundations wishing to respond to disasters in their communities.



★ **May 2008: £10 million distributed in grant aid!**

**August 2008: Nought to Nineteen (n2n) Fund launched**

A new Cumbria County Council funded grant programme worth £540,000 over the next 3 years.

**September 2008: Cumbria Grassroots Endowment Challenge launched**

The Foundation is challenged to raise £1 million by March 2011 to claim £500,000 government match funding for Cumbria.

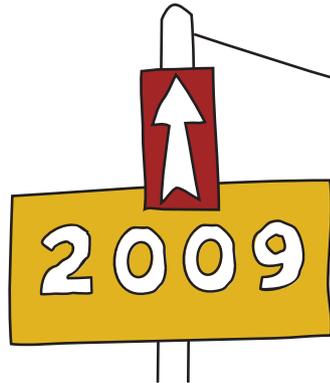


**HOORAY!**

★ **November 2008:**  
**Nuclear Management Partners  
£2.5 million new fund**  
The new management consortium at Sellafield choose the Foundation to host a major new £2.5m Community Fund for West Cumbria, our largest corporate fund to date.



Andy Beeforth with NMP Chair Tom Zarges  
(Photo courtesy Cumbrian Newspapers)

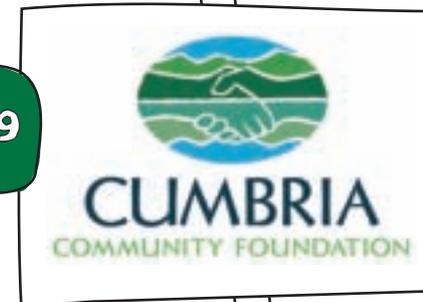
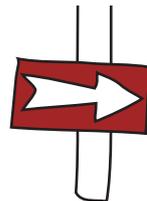


★ **March 2009:**  
**Foundation exceeds  
first year Grassroots target**  
and to date the Foundation has raised a total of £344,781 towards its £1 million target by March 2011.

★ **June 2009**  
**10th Anniversary Celebration**  
Foundation trustees, staff, supporters and friends celebrate the Foundation's 10th Anniversary together at a special event hosted by founder John Fryer-Spedding at the Foundation's birthplace, Mirehouse.



(l to r) Foundation Vice Presidents Arthur Sanderson and John Fryer-Spedding cut the Foundation's 10th Anniversary cake with President James Cropper's Lord Lieutenant's sword!



# CONNECTING PEOPLE WHO CARE...

HIGHLIGHTS FROM  
**10 YEARS**  
OF GIVING AND  
GRANT MAKING

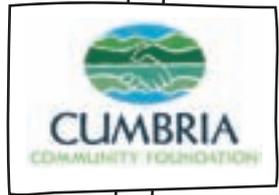
**I CARE**

**WE MATTER**

**WE CARE**

**1999**

**2009**



## THE JANETTA 'TOPSY' LAIDLAW FUND: A Legacy

Topsy Laidlaw was an occupational health specialist who worked for the Cumbria Health Authority. It was her wish that money from her estate be used to help elderly people in Carlisle. The purpose of the fund is to provide comfort, support and equipment to enable elderly people to stay in their chosen environment, whether at home or elsewhere. The Trust made its first grant in February 2008.

The fund was set up by Topsy's sister Eleanor who heard about the Foundation through her solicitor. She decided to give through the Foundation because of its ability to carry out the specific wishes of her sister for whom the fund was created. She is very happy with her experiences working with the Foundation, feels kept informed of what is happening and always feels able to contact the Foundation if she has a question.



Janetta 'Topsy' Laidlaw (top)



Mike Godridge, Chair of Brampton Community Association and Carlisle Alzheimer's Society (photo courtesy Cumbrian Newspapers)

## BRAMPTON COMMUNITY ASSOCIATION: GRANTED £300

**Dementia awareness and community support**  
The grant supported a series of lunchtime events during Dementia Awareness Week and an Early Diagnosis event in February 2009. The sessions enabled people to share experiences, access relevant, helpful information and have now provided the kernel for a new support group for Brampton. The success of the project has led to the Government funding a 3 year pilot project in the Brampton area as a part of the National Dementia Strategy, *Living Well with Dementia*.

Mike Godridge, Chair of Brampton Community Association and Carlisle Alzheimer's Society said 'The grant helped lay a foundation of understanding of living with dementia in the local community which has enabled us to create positive self-support opportunities for people using community facilities.'

## THE SELLAFIELD SITE FUND: A Corporate Fund

The Sellafield Site Fund was created in 2006 with donations from Sellafield Ltd., the Nuclear Decommissioning Authority and the UK Atomic Energy Authority. The main purpose of the fund was to focus resources into grassroots local organisations in Allerdale, Copeland and Barrow. The fund favoured projects which contribute to regeneration and addressed issues such as health and substance misuse, homelessness and crime prevention. The fund also favoured projects supporting the elderly and disabled and schemes which helped disadvantaged communities through art, music and sport.

'We created the Sellafield Site Fund to ensure we could reach right down into the smallest local groups. The Foundation truly reaches the parts other organisations can't reach.' John Sidney, Former Supply Chain Ombudsman, Sellafield Site.

# ...WITH CAUSES THAT MATTER

**WE MATTER**

**I CARE**

**WE MATTER**



## **THE RISING SUN TRUST, WORKINGTON: GRANTED £9,500**

### **Support for drug and alcohol users and their families**

The Rising Sun Trust also celebrate their 10th Anniversary this year. Established in 1999 by Dave Smith following the death of his 18 year old son Ryan from drug misuse, the Trust was set up to support drug and alcohol users and their families in their battle against addiction. A £5,000 grant in 2007 helped set up a new drop-in centre and activities programme, enabling clients to develop skills they didn't realise they had. A grant of £4,500 in 2008 meant the Trust's secondary school education programme *The Know* could be extended into primary schools, enabling drug and alcohol education to start at an earlier age.

Trust Director and Founder Dave Smith said *'The Foundation has helped us tremendously over the past 10 years, not just with financial support but also by giving advice and direction towards other ideas for fundraising. The staff have always been very helpful and professional and we can only thank them for their help and support.'*



Sellafield Site (top)

Dave Smith, Founder and Director of the Rising Sun Trust (photo courtesy Cumbrian Newspapers)

## **THE KIPLING FUNDS: A Legacy**

George Kipling lived and farmed at Burgh by Sands. He was a man who really cared about his community and rural life and in particular had a concern for the welfare of children and older people. As he was a widower with no children, he decided to leave the majority of his estate to charity. The executors of his will agreed the best way to fulfil his wishes was to establish two funds at the Foundation, one benefiting children and young people and the other the elderly throughout Cumbria.

*'As a professional adviser I knew that the Community Foundation would be able to meet George's wishes... I think George would be very pleased if he could see the difference that he is making to the lives of people in Cumbria and to know that his gift will go on making a difference for a very long time to come.'*  
Ian Brown, Accountant, Dodd & Co.



George Kipling (top)



Moresby Over 60s Club Members enjoy Christmas Lunch

## **MORESBY OVER 60s CLUB: GRANTED £800**

### **Funding for hall heaters and Over 60s Christmas party**

Moresby Over 60s Club provides much needed social opportunities for the community's elderly residents, many of whom suffer from restricted mobility due to their age leading to increased social isolation. The grant enabled the purchase and installation of two new convector heaters for the meeting hall used by the club. It also provided a Christmas lunch party at the Sunny Hill Hotel for over 30 elderly people, including transport and a Christmas bonus each in their Christmas cards.

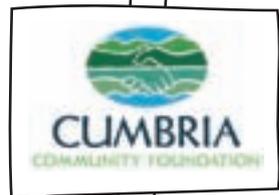
Club Secretary Margaret Horricks said *'Without the grant we wouldn't have been able to have the Christmas lunch and without the new heaters most of the members would have stopped coming because the hall was just too cold in the winter.'*

# CONNECTING PEOPLE WHO CARE...

HIGHLIGHTS FROM  
**10 YEARS**  
OF GIVING AND  
GRANT MAKING

**1999**

**2009**



**I CARE**

## ROSELANDS TRUST: Anonymous Private Donor

The Roselands Trust supports people facing disadvantage in Cumbria, particularly the elderly or those with learning difficulties. The fund was established in February 2006 by a successful businessman whose company is based outside Cumbria but who now lives here. Originally considering setting up his own charitable trust, the donor was concerned about making sure the most deserving groups benefit. He was also anxious not to attract personal attention as he prefers to give anonymously. He decided to set up a fund with the Foundation because *'the time needed to properly manage a grant programme was going to be too much for me as an individual, and that the Foundation had both the capacity to do it and the knowledge to meet my requirements.'*



SLSB swimmer, Neil Sindale

**WE MATTER**

## SOUTH LAKES SOCIETY FOR THE BLIND: GRANTED £1,000

### Hydrotherapy for the visually impaired

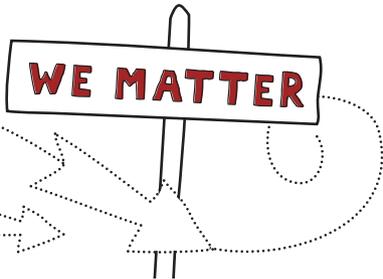
The Roselands grant enabled SLSB to provide fortnightly swimming sessions for visually impaired people in the South Lakes. One of the participants, Neil Sindale from Bowness, had a stroke two years ago causing him to lose much of his vision and some of his mobility. He has found the swimming group *'absolutely excellent.'* The regular exercise has improved his health and well-being and the regular social contact with other visually impaired people has helped him combat isolation and *'adjust and adapt to living with sight loss.'*

**WE CARE**

## HIGH SHERIFF'S CRIMEBEAT FUND: Themed Fund

The High Sheriff's Crimebeat Fund was established in 2006 by Adam Naylor during his tenure as High Sheriff. A founding donation came from the Cumbria Crimebeat Fund that had been dormant for a number of years. Since then, the fund has continued to receive donations from fundraising activities organised by the current High Sheriff. The next High Sheriff, Robin Burgess, a Foundation Trustee, helped raise £10,000 for the Crimebeat fund by spending a night in Carlisle's police cells.

# ...WITH CAUSES THAT MATTER



## PITSTOP PROJECT, BARROW: GRANTED £2,000

**IT equipment for young people**  
The High Sheriff's Crimebeat Fund made its first grant to Barrow charity Pitstop. The £2,000 grant provided additional IT equipment needed due to the project expanding into a new building. Pitstop is now a well-established social enterprise providing a link between education and employment for young people who may have been excluded from school, referred by a pupil referral unit or youth offending team.

*'We're able to offer a different type of education, with the emphasis on vocational and hands-on experiences. Our students may be failing in the normal school environment due to learning difficulty, family break-up or disaffection with school. In a lot of cases the problems are only temporary... Once we know the problems behind the resulting behaviour we're able to take the necessary steps'* **Richard Johnston, Project Manager, Pitstop**



Robin Burgess behind bars for a good cause (top)  
(Photo courtesy of Cumbrian Newspapers)

Pitstop 'a different type of education'

## MARY GRAVE TRUST: Charitable Trust

The Mary Grave Trust was established in the 1970s to help young people from low income families in West Cumbria travel abroad. It was set up by a local businessman in memory of his mother who lived in Maryport. The family had strong connections with West Cumbria and a real commitment to its people. Former Chair of the Trust, Pat Black, explains *'We are really keen to help young people take part in journeys that broaden their horizons, develop their skills and might even change their lives.'*

The Foundation has helped manage the Mary Grave Trust since April 2005 and in February 2009 this partnership was cemented with the Foundation becoming sole trustee and former Mary Grave Trust Trustees represented on the Foundation's own Board to oversee grant making.



Pat Black, former Chair of The Mary Grave Trust (top)



The McSorley sisters with mum

## THE MCSORLEY SISTERS: GRANTED £3,568

**Katy (20), Zoe (17), Emily (15) & Lucy (15)**  
Alison McSorley is proud of her four daughters' sense of adventure. All four have travelled abroad with the help of the Mary Grave Trust. Twin sisters Emily and Lucy took part in a school skiing trip to Italy and eldest daughter Katy, now 20, travelled to Eastern Siberia with the Guides. Sister Zoe used her grant to take part in a school History of Art trip to prepare for her AS exam. *'Going to Rome was the first time I'd ever left the country or been on a plane without my family, meaning I had to be independent and look after myself, my belongings and be aware of my own safety... I'll remember the trip for a long time.'* Mum Alison said *'Without the Mary Grave Trust, the girls wouldn't have had the opportunities and experiences they gained from these trips. Thanks so much to you all.'*



Launched in 2002 at the Dock Museum in Barrow, the Trust's aim is to build a better Barrow and address the issues which make it one of the most deprived boroughs in the county. To date, the Trust has given out nearly £800,000 in grant aid to voluntary and community groups in the borough. The Trust has also raised over £25,000 towards the countywide Grassroots Challenge which the borough will benefit from directly.



Barrow Community Trust Committee at the launch of the Grassroots Challenge for Barrow (left to right) John Green, Rob Cairns (Chairman), June Chapman, Joe Sides, Andy Beeforth, Ann Hayes, Lyndsay Aspin and Sarah Gardner  
(Photo courtesy Cumbrian Newspapers)

2009 has been a busy year for the Trust with the launch of the Grassroots Challenge for Barrow at a special Spaghetti Evening at

Salvana's restaurant in February and its sixth Annual Charity Ball at Abbey House Hotel in March, supported by over 100 guests. Local businesses and individuals helped the Trust raise nearly £3,000 at the auction bidding for glider flights, rally car rides, holiday cottages and a tour of BAE's Astute submarine.

July saw the official launch of the Trust's new DVD at a drinks reception at the Town Hall hosted by Cllr Dorothy Dawes, Mayor of Barrow-in-Furness. The evening was attended by local businesses, individual supporters and members and a selection of groups who had benefited from the Trust's funding. The DVD features documentary footage and interviews with voluntary and community groups who have received grant aid and who would have struggled to survive without the Trust's support.

#### Committee Members 2009

- Rob Cairns (Chairman)
- Lyndsay Aspin
- June Chapman
- Cllr Dorothy Dawes
- John Green
- Ann Hayes
- Derek Lyon
- David Maguire
- Joe Sides
- Cllr Ken Williams

## GIVING TIME INSTEAD OF MONEY



### PROHELP

Cumbria ProHelp matches individual professional volunteers with groups needing advice in areas such as finance, surveying, IT and business planning. Originally set up in 2002 as *Business Buddies*, the scheme merged with Business in the Community's *ProHelp* in 2005 and since last year is again our own scheme, currently funded by Nuclear Management Partners. Working in partnership with Cumbria Council for Voluntary Service (CCVS), the scheme has helped hundreds of community groups to develop through the assistance of professional volunteers. It has also contributed to the corporate social responsibility targets of many businesses and the professional volunteers themselves have derived a great sense of personal satisfaction from contributing to their local community.

### TEAM VOLUNTEERING

As well as individual volunteering, the Foundation is also able to match teams of volunteers, such as a group of employees, with suitable community projects. Team volunteering not only brings fast and substantial results to the community group concerned but also brings benefits to the business in the form of increased staff morale, improved teamworking and communication skills. Shepley Engineers, who recently set up a new Grassroots fund with the Foundation, have also introduced social awareness to their apprenticeship training. They were looking for a suitable project and the Foundation matched them with the Centre for Complementary Care at Muncaster, a respite and therapeutic facility used by disabled people and those suffering from ill health and terminal illness. Shepley's apprentices have now created a new wheelchair path through the garden, much to the delight of Centre Director Gretchen Stevens who told us 'Shepley are simply wonderful! The apprentices are just delightful... hard working and sweet. They eat a lot of lunch (pies, mostly) and get through a lot of work... They are like fairy godfathers!'



Corporate Fundholders Nuvia Ltd. try staff team volunteering (top)

Shepley apprentices 'like fairy godfathers!'

# GRASSROOTS ENDOWMENT CHALLENGE... UPDATE



The government has challenged the Foundation to raise £1 million in new endowed funds by March 2011 to claim another £500,000 of match funding for Cumbria. For new donors this means the added incentive of a 50% government top-up on their donations including gift aid. We are the only charity in the county able to offer this incentive to donors. (For further information, please see *Ways of Giving* on page 20).

As we go to press, the Foundation has exceeded its 15 month review target raising £344,781, one of the best results nationally, which includes seven new Grassroots funds...

## CORPORATE GRASSROOTS FUNDS

- **Thomas Graham Grassroots Grants Fund** Created with a donation of £25,000 from Thomas Graham Ltd., the Carlisle based steel stockists. Managing Director Roger Smith said 'I look forward to building this fund over time.'
- **Shepley Group Grassroots Grants Fund** The Shepley Group Fund has pledged £25,000 to create a new named fund. Paul Scott, Managing Director of Shepley Group said 'We are committed to our corporate social responsibilities.'
- **Westmorland Grassroots Grants Fund** Local business Westmorland Limited, which owns the Rheged Visitor Centre and Tebay Motorway Services has pledged £50,000 which will enable grants to be made in and around the places where their employees live.

## PRIVATE GRASSROOTS FUNDS

- **Ullswater Trust Grassroots Grants Fund** An Ullswater couple have pledged £38,400 to create a fund supporting children and young people's projects in Cumbria with a preference for Eden District.
- **Quarry Hill Grassroots Grants Fund** An anonymous couple made an initial donation of £12,800 which has since been topped up by a donation of £64,000 from friends outside Cumbria. The fund will make awards to benefit children and young people throughout Cumbria.
- **Wing Cdr. H. Thompson MBE & Rev. J. L. Green Grassroots Grants Fund** A couple with close ties to Barrow-in-Furness committed £25,000 to create a fund supporting the personal development of young people through involvement in community and environmental initiatives in the borough.
- **The Evening Hill Fund** An anonymous couple made a donation of £25,000 to create a fund benefiting 16 - 25 year olds and improving elderly people's quality of life, particularly in rural areas.

Shepley MD Paul Scott celebrates their new fund with Andy Beeforth

In addition to the seven new Grassroots funds, the Foundation is delighted to report several other new or renewed funds:-

**Nuclear Management Partners Ltd** set up a £2.5 million 5 year fund that will support communities and individuals in West Cumbria, our largest corporate fund to date.

**BNFL** our founding donor 10 years ago continued their support by leaving a half a million pound legacy to West Cumbria. With a donation of over £500,000 they established *Live the Dream*, a bursary fund to support individual excellence.

**Cumbria County Council** established the *Nought to Nineteen (n2n)* fund that runs until March 2011. This was in recognition of the important contribution made to the lives of children and young people by the Local Network Fund which ceased in March 2008.

Having experienced the Foundation's expertise for a number of years, the **Mary Grave Trust** formally transferred trusteeship of an endowed fund worth £1,087,000 to the Foundation.

The Foundation also successfully renewed funding programmes from the **European Social Fund, Coalfields Regeneration Trust and Comic Relief.**

## A GOOD YEAR FOR ENVIRONMENTAL PROJECTS

Our ability to support environmental projects has increased with four new community benefit funds linked to wind farms totalling £60,000 in grant aid per annum for at least the next 10 years. In addition a donation from the Crofton Trust has increased our long term funds by £60,000. The Community Foundation's Environment Fund also awarded its first grants this year supporting a wide variety of projects from a wind turbine to farm visits for school children, helping them learn about the links between food, health, farming, environment and community.



The Foundation's Environment Fund awarded Copeland Suckler Cow Group £1,000 towards the costs of educational farm trips for local school children





An easy and simple way for businesses to 'put something back' and show support for their community is to join the Foundation as a Corporate Member.

In 2007 we introduced an enhanced level of Corporate Membership, known as *Challenge Membership*, for those businesses wishing to give more to the Foundation. Our current standard Corporate Membership subscription is £150 or £350 for larger businesses with over 50 employees. Challenge Membership is £650 or £1,350 for larger businesses.

We would like to thank our 35 Challenge Members and 120 Corporate Members for their ongoing support during difficult financial times.

Many businesses choose to benefit from the Foundation's expertise in local need and outsource the administration of their charitable giving by setting up a fund with the Foundation (see page 15). New corporate funds also currently benefit from a 50% government top-up through the Grassroots Endowment scheme. Businesses wishing to explore this option are asked to contact the Foundation's Development Director, Elaine Wise on 01900 820822 or email [elaine@cumbriafoundation.org](mailto:elaine@cumbriafoundation.org).

## CORPORATE & CHALLENGE MEMBERS...



### Corporate Challenge Members

- Academy for Chief Executives
- Amey Infrastructure Services Ltd
- Armstrong Watson
- B I Properties Ltd
- BAE Systems plc
- Baines Wilson LLP
- Bay Radio
- Border Asset Management
- Burnetts Solicitors
- Carrs Billington Agriculture (Sales) Ltd
- Carrs Flour Mills Ltd
- Carrs Milling Industries plc
- Coordination Group Publications
- Cumbrian Homes Ltd
- Dodd & Co (Carlisle)
- EH Booth and Co Ltd
- Fluor Ltd
- Furness Building Society
- H & H Group Plc
- Invest in Cumbria
- James Cropper Plc
- JN Murray Ltd
- Lake District Estates Co Ltd
- Lamont Pridmore
- M-Sport Ltd
- Northern Security Ltd
- Organico Wines Ltd
- Robert Hughes Ltd
- S.D.S. 06 Ltd
- System Group Information Technology Ltd
- Thomas Graham and Sons Ltd
- Washington Division of URS Corporation
- Westmorland Limited
- Windermere Lake Cruises Ltd



- Windermere Marina Village

### Corporate Members

- Abbey House Hotel
- AHC and Partners Ltd
- Amec Nuclear
- AMW Contractors Ltd
- Architects Plus (UK) Limited
- Associated British Ports
- Bank of England
- Bendles
- Billerud Beetham Ltd
- Birchwood Farms Ltd
- Birse Nuclear
- Blue Pole Design
- Bookends (The Carlisle Bookshop)
- Boulting Group plc
- Bowness HR Ltd
- Brewin Dolphin
- Briery Homes Ltd
- Capita Symonds Ltd
- Carlisle Diocese (Church of England)
- Carlisle Glass Ltd
- Carlisle Refrigeration Ltd
- Carter Jonas LLP
- Castellum Ltd
- Castle Green Hotel
- Castlegate House Gallery
- Cavaghan and Gray Group plc
- Centrica Energy HRL
- Cinnamon Creative Events
- CN Group Ltd
- Co-operative and Mutual Solutions Ltd
- Cowens Ltd
- Cranstons Ltd



- Cumberland and Westmorland Herald
- Cumberland Pencil Company
- Cumbria Chamber of Commerce and Industry
- Cumbria Rural Enterprise Agency Ltd
- Cumbrian Seafoods Ltd
- David Allen and Co
- Day Cummins Architects
- Design Promotion and Marketing Ltd
- Dickinson Dees
- Dixon Printing Company Ltd
- Doosan Babcock Energy Ltd
- Eastman Chemical Workington Ltd
- Eden Bridge Enterprises Ltd
- Edwin Thompson
- English Lakes Hotels Ltd
- Fastness Data Services Ltd
- Firpress Group Ltd
- Florence Madden Associates
- Furness Newspapers Ltd
- Genll
- Gibbons and Company
- Gilbert Gilkes and Gordon
- Hanson Contracting
- Herbert Smith LLP
- Hertel (UK) Ltd
- Holmgate Farms Ltd
- Houghton Parkhouse Ltd
- HSBC Bank Plc
- Ibis Hotel Carlisle
- Indorama Polymers (Workington) Ltd
- Innovia Films Ltd
- Jacobs Engineering UK Ltd
- James Walker and Co Ltd
- JL Winder and Co
- K Village Outlet Shopping

...OCTOBER 2009



- Karen Rhodes Catering
- Kier Construction Ltd
- Kimberly Clark Ltd
- KPMG
- L & W Wilson (Endmoor) Ltd
- Laboratory Impex Systems Limited
- Laings Charitable Trust
- McVities
- Mike Hughes Kitchen & Bedrooms Ltd
- Miller Waite Ltd
- Mitchells Auction Company Ltd
- Multi-Design Consultants Ltd
- National Farmers Union (North Cumbria)
- NB Lancaster and Co
- Netcentrix Ltd
- Northeastern and Cumbrian Co-op
- Nuclear Decommissioning Authority (NDA)
- Nuclear Management Partners Ltd
- Nuvia Ltd
- Oil States MCS Ltd
- Open University in the North
- Paradigm Partnership Ltd
- Peill and Co
- Penrillian
- PFD (Carlisle) Ltd
- Pirelli Ltd
- Poole Townsend
- Poppi Red Ltd
- Powered Access Certification Ltd
- PricewaterhouseCoopers
- Ravenglass and Eskdale Railway Co Ltd
- Rayrigg Estates Ltd
- RG Parkins and Partners Ltd
- Risedale at Abbey Meadow
- RM Consultants Ltd

- Robert Meacock and Company
- Russell Armer Ltd
- Salvana's Ristorante
- Sarah Nelson's Grasmere Gingerbread Shop
- Sellafield Ltd
- Serco Assurance
- Shepley Engineers Limited
- Smiths Gore
- Smurfit Kappa Composites
- Spedding Dental Clinic
- Stollers Furniture World
- Telford Hart Associates
- Ullswater Navigation and Transit Co Ltd
- Warwick Mill Business Centre
- WCF Ltd (Brampton)
- West Cumbria Business Cluster Ltd
- West Lakes Renaissance
- Westmorland Marquee Hire

*Nuclear Management Partners' Charlie Anderson (left) and Chairman Tom Zarges join Monkwearay Breakfast Club pupils for the launch of their community fund for West Cumbria (Photo courtesy Cumbrian Newspapers)*



# FIRST GRANT STORY

## Grisedale Community Garden

Awarded £450 in 2000 towards the start-up costs of creating a new community garden in Alston Moor on land leased from the County Council. The grant paid for earth works and the buying of new plants. The local community are involved with the upkeep of the garden with local Brownies helping with weeding and those doing community service assisting with other tasks.

Head gardener Ray Macro describes the garden as 'a very peaceful place.'



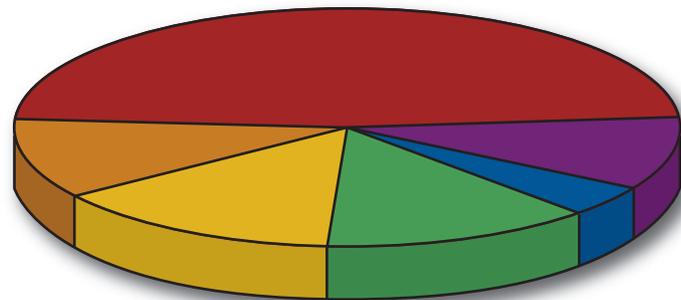
Grisedale Community Garden 'A very peaceful place.'

## CUMBRIA COMMUNITY FOUNDATION...

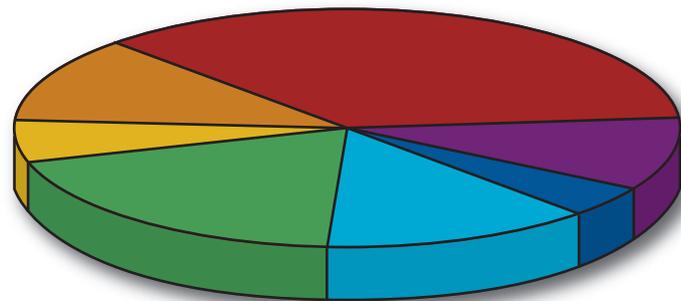
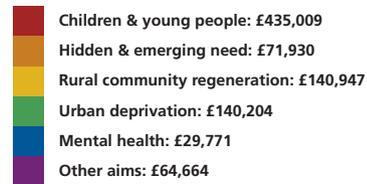
Cumbria Community Foundation Funds	Total Amount Awarded £	No. of Grants
AIM Foundation Fund	10,000	2
Allerdale Community Fund	48,858	53
Allerdale Youth Bank	3,079	8
Alston Moor Community Fund	500	1
Barrow Community Trust	5,700	6
Bridging the Gap	114,229	16
CN Group Fund	3,000	2
Cumberland and Westmorland Herald Fund	1,650	4
Cumbria Communities Fund	13,787	18
Cumbria Community Grants	40,132	4
Cumbria Community Foundation Trust	13,302	3
Cumbria Cultural Fund	1,750	2
Dora Beeforth Memorial Fund	662	2
Environment Fund	27,128	10
Fluor Cumbria Fund	35,312	28
Foundation Grants	42,429	23
Gibb Charitable Trust Fund	600	2
Glamis Holiday Fund	2,470	2
Grassroots Grants	217,792	106
High Pow Community Fund	5,000	1
High Sheriff's Crimebeat Fund	1,000	2
HSBC Fund	1,300	3
Janetta 'Topsy' Laidlaw Fund	300	1
Kipling Fund for Older People	800	1
Kipling Fund for Younger People	1,368	3
n2n Fund	144,000	29
n2n Fund (Children's Fund)	54,000	15
Nuvia Fund	500	1
Russell Armer Fund	1,500	2
Sellafield Site Fund	53,783	26
Sport Relief Fund	12,770	6
Violet Laidlaw Trust Fund	425	1
Winscales Community Fund	13,399	2
Youth Aid Work Fund	10,000	2
<b>Total</b>	<b>882,525</b>	<b>387</b>

# ...GRANT MAKING 2009

Grant making managed by Cumbria Community Foundation	Total Amount Awarded £	No. of Grants
Cumberland Educational Foundation	43,000	3
Edmond Castle Educational Trust	5,130	13
Holehird Trust	40,179	40
Joyce Wilkinson Trust	21,545	19
Mary Grave Trust	54,067	78
<b>Total</b>	<b>163,921</b>	<b>153</b>
<b>Total grant making through the Foundation</b>	<b>1,046,446</b>	<b>540</b>



2008/09 Grant Making by Strategic Aim



2008/09 Grant Making by Area



Parton Village celebrate the Foundation's 10th Anniversary

In 2008-09 our grant making of **£882,525**

supported the work of

**5,064 VOLUNTEERS**

which in turn benefited

**129,719 PEOPLE**

This was possible by making

**540 GRANTS IN TOTAL**

with voluntary and community groups awarded

**435 GRANTS**

and individuals awarded

**105 GRANTS**

# MEMBERSHIP AND DONATION FORM

Name(s) .....

Address .....

Postcode .....

## I WOULD LIKE TO:

- Make a one-off donation of £..... and enclose a cheque payable to 'Cumbria Community Foundation (Grassroots Challenge).'
- I wish to donate regularly and have completed the Banker's Order Form below.
- I would like to find out more about creating my own fund at the Foundation.
- I wish to become an individual member (£25) / family member (£50) and have completed the Banker's Order form below.
- I wish to become a Corporate Member (£150 or £350 for businesses over 50 employees) or a Challenge Member (£650 or £1,350 for businesses over 50 employees) and have completed the Banker's Order form below.
- I wish to become a voluntary & community sector member (£15) and have completed the Banker's Order form below.
- I would like to become a ProHelp volunteer or get involved in team volunteering.

## BANKER'S ORDER: For regular donations and membership subscriptions

To The Manager ..... Bank Plc  
 Bank Address .....  
 Post Code.....

Please pay the sum of £..... on the ...../...../.....  
 and the same sum on the same day each year/quarter/month\* (\*delete as appropriate)  
 EITHER Until further notice OR for ..... months/years starting today.

Payable to: Cumbria Community Foundation, HSBC Bank plc, Carlisle City Office, Cumbria.  
 (Account No: 32152967 Sort Code: 40-16-22 Charity number: 1075120)

Signed: ..... A/c No: .....  
 Name: .....(BLOCK CAPITALS) Date: ...../...../.....

## GIFT AID DECLARATION: (for individual UK tax payers, i.e. not companies)

Charities are able to reclaim tax on all donations where the donor has completed a Gift Aid form. A single Declaration may cover more than one donation. Cumbria Community Foundation is to treat as Gift Aid Donations:

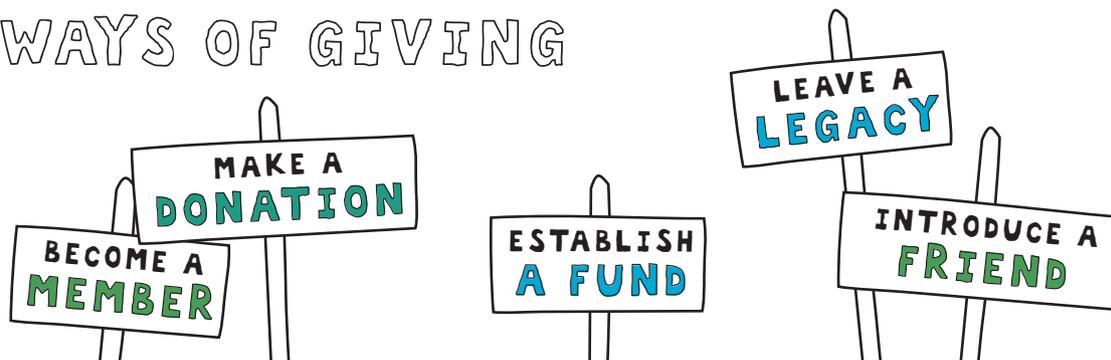
- 1 the enclosed donation of £.....
- 2 all donations I make from the date of this declaration until further notice.

Dated: ...../...../..... Signature: .....

Notes: You can cancel this declaration at any time by notifying Cumbria Community Foundation. You must be paying an amount of income tax and or capital gains tax at least equivalent to the tax that the charity reclaims on your donation in the tax year. If you are unsure whether your donations qualify for Gift Aid relief please ring us or ask your local tax office for Gift Aid leaflet IR113. Please notify the Foundation if your circumstances change in the future.

Please return your form free to: Cumbria Community Foundation, FREEPOST, NWW7333A

# WAYS OF GIVING



## BECOME A MEMBER

Whether you're an individual, a family, an employee, a business owner or a voluntary/community sector organisation, becoming a member makes a real difference to us.

## MAKE A DONATION

The Foundation welcomes donations of all sizes. If you are a UK taxpayer, for every £1 you give we receive an extra 28 pence back from Revenue & Customs. What's more, thanks to the current Grassroots Endowment scheme, we can also claim an extra 50% top up from the government. That means for every £1 you give, the Foundation receives £1.92, nearly double the value. All you have to do is fill in the attached gift aid declaration, enclose it with a cheque and we'll do the rest.

## ESTABLISH A FUND

For more substantial charitable gifts, you may prefer to set up a fund which is an easier and more cost-effective alternative to setting up a charitable trust, particularly now with the 50% Grassroots top-up. Donors can set up a fund by either donating cash or perhaps making a gift of shares, land or property. Whatever form the donation takes, there is a range of different types of fund to choose from depending on your requirements:

## Acorn Fund: (£15,000 +)

An Acorn Fund can be built up over 10 years (for less than £100/month plus gift aid plus Grassroots top up). You can choose a name for your Fund, but grants are not made in the name of the fund until it reaches maturity.

## Named Fund: (£25,000 +)

As with the Acorn Fund, you can name the fund, perhaps a family name or in memory of a loved one. In addition you can choose a broad theme and geographical area of benefit.

## Donor-advised Fund: (£50,000 +)

In addition to the above benefits you have the ability to actively select which specific projects and organisations benefit from your fund if you so wish.

The above tariff relates to our invested, long term capital funds. Some people prefer to donate an amount annually for immediate grant making. We call these funds 'flow through' funds. The normal minimum sum for a named and donor advised flow through fund is £10,000 pa.

## LEAVE A LEGACY

Some people prefer to make a charitable gift by leaving a legacy in

their will. Executors and beneficiaries can also set up Legacy Funds retrospectively by Deed of Variation, which provide a fitting memorial of a loved one.

## INTRODUCE A FRIEND

The best form of advertising is personal recommendation. If you like what we do, then please tell someone about us.

## GRASSROOTS SCHEME

All donations to long term capital funds, including legacy funds, may be eligible for a 50% top-up through the Grassroots scheme provided they are made before 31 March 2011.



President James Cropper cuts the cake with Trustee Peter Hensman at Hill Top

# FOUNDATION TRUSTEES 08/09



## PATRON

Viscountess Whitelaw

## PRESIDENT

James Cropper FCA

*HM Lord-Lieutenant of Cumbria*

## VICE PRESIDENTS

The Lord (Melvyn) Bragg of Wigton DL

The Right Reverend Graham Dow  
*Lord Bishop of Carlisle (retired)*

John Fryer-Spedding CBE DL  
*Vice Lord-Lieutenant of Cumbria*

The Lord (Richard) Inglewood DL  
Arthur Sanderson OBE DL

## TRUSTEES:

### Chair

Bob Mather CPFA  
*Former Deputy Chief Executive,  
Cumbria County Council*

### Vice-Chair

Ian Brown FCA  
*(appointed 3 December 2008)*

### Honorary Treasurer

James Carr DL  
*Former Chairman, Cumberland Building  
Society*

### Company Secretary

David Brown  
*Former Solicitor, Latimer Hinks*



## TRUSTEES CONT:

- Susan Aglionby DL  
*Guider, D of E Award Assessor and Farmer*

- Catherine Alexander  
*(appointed 3 December 2008)  
Chief Executive, Castle Green Hotel*

- Eric Apperley  
*(appointed 25 September 2008)  
Former Trustee, Mary Grave Trust*

- Robin Burgess OBE DL  
*Chief Executive, CN Group*

- Rob Cairns DL  
*Chief Executive, Furness Building Society*

- Mike Casson  
*(appointed 3 December 2008)  
IFA, Helm Godfrey*

- June Chapman  
*Businesswoman*

- Chris Coombes  
*Locality Manager, Cumbria Council for  
Voluntary Services*

- Sarah Dunning  
*Chief Executive, Westmorland Limited*

- Captain John Green  
*(retired 13 November 2008)  
Port Manager & Harbourmaster,  
Associated British Ports, Barrow-in-Furness*

- Trevor Hebdon  
*Former Chief Executive, H&H Group plc*



## TRUSTEES CONT:

- Peter Hensman DL FCA  
*Director, Lake District Estates Co. Ltd.*

- Heike Horsburgh  
*Chief Executive, Young Cumbria*

- Christine Hughes MA  
*Solicitor (appointed 12 March 2009)*

- Derek Lyon  
*(appointed 3 December 2008)  
Former Solicitor and Town Clerk, Barrow*

- Dick Raaz  
*(appointed 9 April 2008)  
Managing Director, LLWR Ltd.*

- Richard Simpson  
*(retired 13 November 2008)  
Project Leader, Barnardos*

- Peter Stybelski  
*(appointed 13 November 2008), Former  
Chief Executive, Cumbria County Council*

- Shirley Williams  
*Head of Public Affairs, Sellafield Ltd.*

- Elaine Woodburn  
*Leader, Copeland Borough Council*

- Charles Woodhouse CVO DL  
*(retired 13 November 2008)  
Former Chair, Rural Regeneration  
Cumbria (now Cumbria Vision)*

- Stewart Young  
*Labour Leader, Cumbria County Council*



# STAFF AND SUPPORT



## FOUNDATION STAFF

### Director

Andrew Beeforth

### Accountant/Grants Officer

Jane Allen

### Grants Development Officer

Roger Hart

### Grants Development Officer

Deb Muscat

### Grants Officer/ProHelp Co-ordinator

David Andrews

### Development Director

Elaine Wise

### Fund Development Officer (Barrow)

Sarah Gardner

### Finance Officer (until April 2009)

Liz Wilson

### Finance Officer (June - August 2009)

Jan Smith

### Administrative Assistant

Glenys Kett

### Administrative Assistant/Assistant Grants Officer

Lynn Postlethwaite



## PROFESSIONAL SUPPORT

### Solicitors

Thomson Wilson Pattinson

### Honorary Accountants

Dodd & Co.

### Auditors

Armstrong Watson

### Honorary Land Agents

Edwin Thompson, Chartered  
Surveyors

### Bankers

HSBC, Carlisle  
Furness Building Society,  
Barrow-in-Furness

### Investment Managers

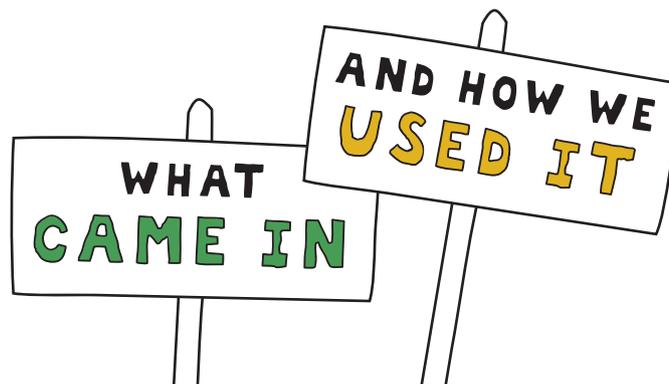
Citigroup Quilter



*Staff Day Out at the Ravenglass & Eskdale Railway*



# FINANCIAL STATEMENT YEAR ENDING 31 MARCH 2009



**Cumbria Community Foundation**  
Year ended 31 March 2009  
Summarised financial information

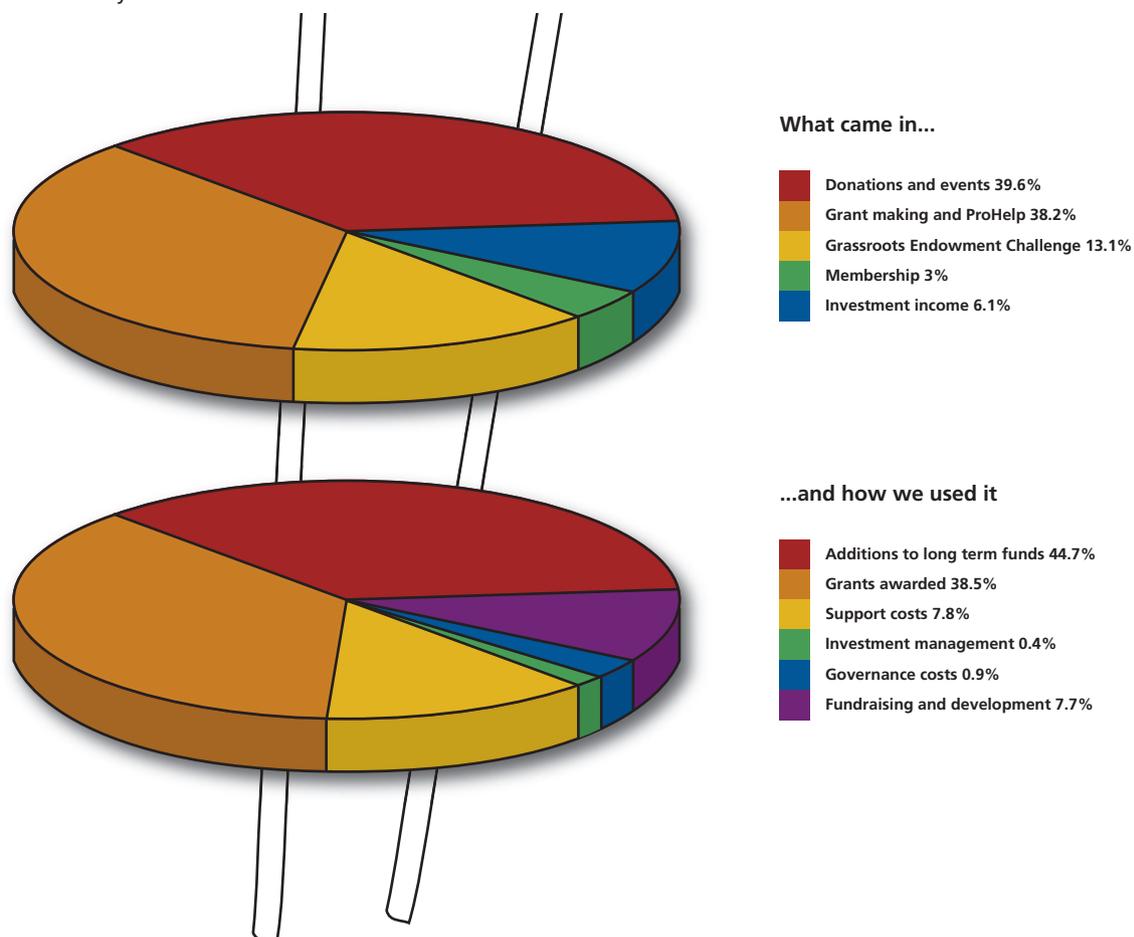
Incoming resources	£
Donations and legacies	1,278,070
Grant programmes	863,747
Investment income	139,426
Events	17,854
Management fees	24,739
<b>Total</b>	<b>2,323,836</b>

Resources expended	£
Grants	882,525
Fundraising, publicity and events	184,348
Grant support costs	178,747
Governance	19,493
<b>Total</b>	<b>1,265,113</b>

Funds at 31 March 2009	£
Long term capital funds	3,128,339
Grant programmes	267,566
Endowment funds	371,013
Core funds	166,747
<b>Total</b>	<b>3,933,665</b>

Cumberland Educational Foundation	536,475
Mary Grave Trust	1,086,717

The following information is drawn from the audited accounts of the Foundation for the year ended 31 March 2009. The accounts received an unqualified audit report from our auditors Armstrong Watson and are available from the Community Foundation.



# ACKNOWLEDGEMENTS



The Foundation wishes to express its gratitude to all those individuals and organisations who have chosen to entrust the Foundation with their funds and to thank our individual and corporate members for their ongoing support.



In particular, we would like to thank Nuclear Management Partners, our Sponsor of the Year, who have also established a new community fund at the Foundation worth £2.5 million over the next 5 years.

We would also like to thank the following people and organisations...



**Caryn Gough, Dada Design** for her talent and generosity designing this publication.

• [caryn.gough@dadadesign.co.uk](mailto:caryn.gough@dadadesign.co.uk)



**Stacy Hurley, Cinnamon Creative** for helping to co-ordinate and add the finishing touches to our 10th Anniversary events this year.

• [www.cinnamonltd.com](http://www.cinnamonltd.com)

**BEAULEA'S CAKE STUDIO, BOWNESS** for providing our wonderful 10th Anniversary cakes.  
• [www.beauleascakestudio.com](http://www.beauleascakestudio.com)



for sponsoring a DVD which has helped promote the Grassroots Endowment Challenge for Cumbria



for sponsoring the publication of our new Professional Advisers' Guide.

## HOME GROUP

for sponsoring the publication of our general leaflet.

## Evening Mail

for sponsoring a DVD promoting the Grassroots Endowment Challenge.



for providing the venue for this year's AGM.



for sponsoring the development of the *Communities that Work* strategy.

We would also like to thank the following organisations who have supported administration and other projects at the Foundation...

- **Francis C Scott Trust**
- **Northern Rock Foundation**
- **M-Sport Ltd** who host the Foundation's office
- **Furness Building Society** who host the Barrow office
- **Big Lottery Fund**

For grant making, we would also like to thank...

AIM Foundation, Allerdale Borough Council, Coalfields Regeneration Trust, Cumbria County Council, Cumberland and Westmorland Herald, Cumberland Educational Foundation, Edmond Castle Educational Trust, European Social Fund Cumbria Community Grants, Fluor Ltd., Holehird Trust, Joyce Wilkinson Trust, Mary Grave Trust, Office of the Third Sector, Sellafield Ltd, Sport Relief and Youth Bank UK.

Finally, a big thank you to Cumbrian Newspapers, The Cumberland & Westmorland Herald and F.C. Wilson, for their photographs.

**Special Needs on Alston Moor**  
SNAM organises activity programmes for young people with special needs which also provides respite for their families during the school summer holidays. Club Leader Hazel Hanley says the £250 funding from the Foundation in 2000 was *'really helpful at the beginning because it was straightforward'* and was used to pay experienced play leaders.

The group is now able to provide twice weekly activities during the summer holidays giving special needs children and young people the opportunity to experience new activities, take part in events and socialise with their peers.



SNAM participants canoeing at Bendrigg Lodge