



**CUMBRIA**  
COMMUNITY FOUNDATION

**ANNUAL REVIEW 2016**  
**PROGRESSION**



**IN GRANTS SINCE 1999**

# CHAIRMAN'S REPORT

*The theme for this year's Annual Review is 'progression'. We all face adversity and challenges at times during our lives. It is the work of the organisations that we invest in that help people rebuild their lives and allow them to overcome problems and achieve their life goals.*

I am delighted to announce that through our fundholders, our communities have benefitted from £30m since the Foundation was established. This investment tackles poverty and disadvantage across the county, helping to make it a better place to live and work.

The devastating floods of December 2015 brought challenge and adversity to over 5,000 homes wrecked across the county. We launched the flood recovery appeal within hours of the first flooding. The response was staggering, with more than £10m raised. Cumbria simply could not have recovered in the way it has without the work of hundreds of local groups including advice agencies, carers, churches, flood action and mountain rescue. I offer renewed thanks to the thousands of people who donated to the appeal.

2 Progression

**Front cover image:** The Carlisle Junior Parkrun was set up in 2016 thanks to a grant from the Cumberland Building Society Charitable Foundation. The 2k run for 4-14 year olds is held at Bitts Park every Sunday morning.

In the year ahead we will publish a new report highlighting the challenges facing the people and communities of Cumbria and use it to inform our grant-making priorities and our work with new fund-holders.

The award winning NCIP, now renamed Place Based Services Programme, was renewed and extended in 2016/17. Together over 37,000 vulnerable adults and older people were supported through the year by over 30 different organisations working in partnership.

2015/16 was the final year of the Nuclear Management Partners (NMP) Community Fund. Over the life of the Fund, NMP invested £2.9m in grants to support over 300 projects, helping community facilities, children's and youth projects with the aim of promoting the life chances and aspirations of people in West Cumbria.

This year I step down as Chairman at the November 2016 AGM. I wish my successor well and hope he or she gains as much satisfaction as me in seeing the benefit of the grants we're able to make.

**Ian Brown DL - Chairman**



# NEW PHILANTHROPIC FUNDS

## GURNEY CHARITABLE TRUST FUND

The Gurney Charitable Trust has long standing connections with north Cumbria. Its trustees decided to create an endowment fund to provide sustainable funding for projects in and around the northern lake district. They have a particular interest in projects promoting positive health and education, and which address poverty.

## BRIAN AND ANN CLARK FUND

Ann Clark is retired and is involved as a volunteer in her local community. She chose to create the fund to ensure causes she and her late husband were close to would be supported. After exploring the creation of a stand-alone trust that would involve her friends, she chose to create a fund with the Community Foundation. The fund will support families, including those having disability and/or mental health issues and assist young people in caring roles, where the aim is promoting greater independence. In addition, the fund will consider applications from small charities experiencing short term financial crisis at risk of closure and built heritage projects. When required the fund can also provide support in response to natural disaster

*Both of these funds will begin making grant awards from April 2017.*

Young carers enjoying holiday activities during the summer break



## SOUTH LAKELAND CARERS

Each year, South Lakeland Carers supports more than 1,000 carers aged between 5 and 96 and offers everything from assessments and one-to-one support to relaxation therapy, counselling, away days, lunch clubs, and specialist support for young carers.

The young carers group has received funding towards residential trips and to purchase art and craft material, and baking equipment. Young people are involved in the design of all their projects, from the initial planning stages through to implementation.

Benita Finch, Operations Manager said: “The break from caring leaves young people feeling less stressed and makes their caring role more manageable. We help them to develop coping strategies to enable them to deal with difficult situations, achieve their personal goals and become independent.”

*Cumbria Community Foundation is proud to manage almost 60 active grant-making funds on behalf of local companies, families, individuals, trusts and public bodies.*

*The Foundation works with donors to fulfil their charitable goals by structuring funds that are customised to fit their unique goals, easy to implement, and supported by our broad community knowledge and expertise.*



The Multimix group enjoying a residential in the Lake District

## FAMILY PHILANTHROPY THE SOLWAY FUND

The Solway Fund was established in 2012 by an anonymous donor. Its focus is to support and encourage children and young adults in West Cumbria, specifically in and around Maryport and Workington. This is where the donor's family grew up.

The donor said: "I believe passionately in west Cumbrian communities and their importance to our society, for today and into tomorrow.

This is why I have a fund. Tackling issues at a local level by leveraging community expertise I believe is the most effective way to give."

The Solway Fund has awarded more than £40,000 to west Cumbrian communities, including a grant to South Workington Youth Partnership to cover the cost of their rent for the next 12 months. The project runs sessions for 4-10 year old and 11-18

year old youngsters in Workington and a group for disabled young people called Multimix, based in Maryport.

Angela Good from South Workington Youth Partnership said: "Without the fantastic generosity of the Solway Fund, the youth group couldn't provide as many opportunities for all its members."

## FAMILY PHILANTHROPY

# THE LAIDLAW TRUSTS

*Eleanor Laidlaw created two grant-making funds in 2007 to remember her sisters, Violet and Janetta. She said: "I wanted my sisters' legacies to live on. They were both deeply considerate of other people's needs, particularly those who are homeless or elderly. Working with the Foundation means that the Funds will not only help tackle today's issues but those in the future too."*

The Violet Laidlaw Trust Fund supports charitable groups helping homeless people or individuals in need of support in the Carlisle City Council area. Cumbria Gateway, a peer-led social enterprise for homeless people in Carlisle, received support from the fund to enable the evening and weekend drop-in facility to open longer during the cold winter months.

The Janetta Topsy Laidlaw Trust makes financial awards to older people who need equipment or additional support that is not available from the State or which people cannot afford.

Dignity in Dementia received a grant from the Janetta Topsy Laidlaw Trust to deliver awareness sessions for family members visiting people in care homes to help them understand more about dementia and how they can communicate more effectively with their relatives.



**Lesley Gill and Diane Smillie, Directors of Dignity in Dementia at the Great British Care Awards, where they were runners up in the Innovations Category 2015**



**Cumbria Gateway's Development Manager, Allison Taylor with staff and volunteers**

# CUMBRIA FLOOD RECOVERY APPEAL

Storm Desmond deposited record rainfall on ground already heavily saturated, causing widespread flooding across the county on 5th December 2015.

More than 6,000 properties were affected by major flooding in Appleby, Carlisle, Cockermouth, Kendal, Keswick and Workington, as well as in isolated rural communities. Many families were evacuated from their homes by the emergency services and rescue teams.

The Cumbria Flood Recovery Appeal was launched the evening of 5th December 2015 with an initial £50,000 donation from our own funds. At that point nobody could have predicted the magnificent public response to the crisis. £1m was raised in less than 5 days and the first grant was made within 4 days. Since then more than 35,000 donations have been received from members of the public, hundreds of fundraising events, local businesses, philanthropists, charitable trusts and with Government match funding the total stands at £10.1m.

In the immediate aftermath of the floods, the priority was to give urgent financial support to those whose homes had been affected by the flooding - to help them pay for temporary accommodation, buy essential items such as clothing, toiletries and so on. In the second phase, people are moving back into their homes, and

need much more substantial grants to cover things like carpets, tables and chairs, beds and bedding, white goods and kitchen units.

The third phase of the appeal is to support households implementing resistance and resilience measures in their home. Funding will also support neighbours who wish to 'pool' their resilience grants to implement local neighbourhood resistance schemes, in collaboration with the Environment Agency, and the County and District Councils.

At the time of writing, many of those who had to leave their homes have yet to return, and we continue to support households through that process for as long as it takes. More than 2,500 households have benefited from £4 million and community organisations have shared £1 million.

Community groups across the county will continue to be supported to cover the costs of community-led flood defence work for public benefit, as well as those providing advice, guidance and emotional support to people affected by the floods.

The trustees of the Foundation wish to express renewed thanks to the thousands of generous people and organisations that donated to the appeal.



To find out more about the  
Cumbria Flood Recovery  
Appeal visit  
[www.cumbriafoundation.org](http://www.cumbriafoundation.org)

# FLOOD OF GENEROSITY SUPPORTS FLOOD VICTIMS

Eden Flood Volunteers formed in early December in response to the floods. They set up a project that provides donated household goods to individuals and businesses that have been affected by the floods.

Initially their focus was in Eden but since securing a Cumbria County Council warehouse in Penrith they have been distributing donated furniture and white goods free of charge to flood affected individuals across the county, enabling them to re-furnish their homes and move on with their lives.

The organisation received the largest grant to date with £105,000 awarded to help with running costs.

Kerryanne Wilde, Chief Co-ordinator of the group, said: "The Flood Appeal has been essential for the continuance of our organisation. Without this grant there would probably be no Eden Flood Volunteers now."

When the River Greta burst its banks in Keswick, Keith had to act quickly. The 33-year-old, who uses a wheelchair, only had time to pack an overnight bag.

Keith, who lives in Riverside Court, was unable to return to his home for three days but when he did he was shocked by the scale of the damage. This was made worse by the fact he was uninsured.

If Keith had not been evacuated from his flat he would have drowned as the water level in his home rose above where he would have been sat in his wheelchair.

He said: "I lost all of my furniture and almost all of my belongings. I got out with just a bag containing a change of clothes and my phone. I'm really grateful to have been given the money because I had nothing left."

Keith received £2,250 to purchase new blinds and electrical items that were lost in the floods and with support from Eden Flood Volunteers, Keith has since been able to move back into his flat.



L-R Kerryanne Wilde, Nicki Butterworth, Sheila Slee, Peter Martin, Jeannie Darroch, Alan Kuzbyt, Wendy Walker and Kieran Parker



Keith Watson

# CUMBERLAND BUILDING SOCIETY CHARITABLE FOUNDATION

The Cumberland Building Society Charitable Foundation (CBSCF) was set up by Cumberland Building Society in November 1998. In 2011 we took over administration of the grant making for the Foundation and working together, we have awarded more than £130,000.

Brian Edmundson, Chairman of the Cumberland Building Society Charitable Foundation, said: "We work closely with the Foundation who administer the grant making on our behalf and undertake the initial assessment of the wide range of applications received. Working in this way we draw on the vast experience and knowledge of local issues, ensuring grants are directed to where they give maximum benefit to those in need in our community. As a 'clearing house' for so many Funds they can often bring funders together for a project which otherwise might fall short of finance – a particularly helpful service to applicants."

Blood Bikes Cumbria & South West Scotland is a group of 50 self-funded volunteers who provide an out-of-hours emergency service, transporting everything from blood to breast milk between the West Cumberland Hospital in Whitehaven, the Cumberland Infirmary in Carlisle and haematology laboratories in Newcastle. They received £1,000 to help with running their new emergency response motorcycle.

Alan Bragg, Treasurer, said: "Within the first twelve months, we made in excess of 300 journeys as well as regular daily transfers during evenings and weekends between West Cumbria and Carlisle, and also Newcastle in conjunction with Northumbria Blood Bikes. This required us to increase our fleet which we would have been unable to do without the funding."



Alan Bragg, Blood Bikes  
Cumbria & South West Scotland

# GRANT STORY

## CUMBRIA WHEELCHAIR SPORTS CLUB (CWSC)

Cumbria Wheelchair Sports Club was born out of the personal challenge faced by one young man. Nathaniel Pattinson was diagnosed with McCune Albright Syndrome with polyostotic fibrous dysplasia and told at the age of 12 that he would have to spend the rest of his life in a wheelchair. Nat said “I wanted to give up and kill myself because there didn’t seem much point in going on.” He was introduced to wheelchair basketball in the north east of England.

The absence of local facilities led his mum Mel and grandfather Ray to set up CWSC. That was six years ago and now the club has over 200 members and satellite hubs in Whitehaven, Penrith, Kendal and at the James Rennie School in Carlisle.

Nat’s journey has been incredible; at the age of 18 he was called up by Team GB to play for in international matches. He has since become a qualified sports coach. For him “the club has made all the difference.”

Mel said: “When we set off it wasn’t just about the sport, it was about getting people back to work, rehabilitation.

“It’s about them realising that being disabled isn’t the end of things, that they can contribute to society just as anybody else can.

*“We have a saying that it’s taking the ‘dis’ out of disability, and focusing on the ability.”*

Nathaniel received £2,000 in 2014 from the Cumberland Educational Foundation to develop as a wheelchair basketball player with the GB under-23 programme.

*The Foundation has supported the club since its beginning and has awarded grants totalling £24,480.*



# WINTER WARMTH APPEAL AND THE BIG SLEEP

Each year the Winter Warmth Appeal raises money to help older and vulnerable people stay warm and well in Cumbria's coldest months.

The campaign aims to raise awareness of the combined effects of fuel poverty and social isolation, and how this puts many self-reliant older people at risk, particularly if they turn down their heating to save money, and become trapped indoors owing to bad weather and icy road conditions.

Instigated by a supporter who wanted to donate his Winter Fuel Payment to assist those more at risk throughout the winter months, the appeal has now raised £500,000 and helped more than 3,000 people survive winter.

Last year we raised a record £136,000. Almost £20,000 of that was raised in one night when hundreds of people were sponsored to spend a night sleeping under the stars for The Big Sleep.

Graham McAvoy, Kieran Askbrook and Cliff DeGraff, all from Workington, took part in the outdoor event and raised £500. They even cycled to Windermere from their homes and then back again the next morning. Graham said: "It's a fantastic atmosphere and it's great to be able to raise money for charity in a fun way. What's important for us though is that all the money we raise will be spent locally, helping Cumbrians stay warm and well."

*If you'd like to sleep out on the shore of Lake Windermere for the next Big Sleep on Saturday 28th January, you can sign up via [www.cumbriafoundation.org/bigsleep](http://www.cumbriafoundation.org/bigsleep)*



# BARROW COMMUNITY TRUST

People with philanthropic interests in the Furness area can direct their giving through the Barrow Community Trust. This fundraising and grant-making fund celebrated 15 years of grant giving this year. The Trust champions projects that make a big difference to the lives of people living in Furness. Since 2002, more than £1 million has been invested in local community projects across the peninsula.

While managed by Cumbria Community Foundation, the Trust works on a hyper-local level and distributes funds to groups and enterprises that tackle poverty and social deprivation in the area. Local man, Tony Keen, MD of SN Group Ltd recently joined the committee as Chair.

St Matthew's Community Hall is located in one of the most disadvantaged wards in the country. A recent grant supported an art club for young people and an art workshop for adults from the more vulnerable and isolated parts of the community.

The project worked alongside local youth groups and organisations including Age UK, Barrow Disability Centre, Mind in Furness, Women's Community Matters, and Cumbria Alcohol and Drug Advisory Service (CADAS) to ensure those most in need were benefited.

Wendy Kolbe, community organiser for St Matthew's Community Hall, said: "Youngsters enjoyed the stimulation of working on a creative project. The older adults who are more vulnerable or have mental health issues really looked forward to the sessions for both the creative and social elements. Throughout the age groups, individuals have shown an interest which will continue long after the project."

The bulk of Barrow Community Trust's fundraising comes from its annual spring ball at Abbey House Hotel. Earlier this year, 130 guests enjoyed the evening which raised almost £8,000 from ticket sales, raffles and auctions.



Barrow residents enjoying the art workshop, run by St Matthew's Community Hall.



## CHAMPIONING LOCAL TALENT

Some philanthropists favour support to individuals to help them follow their passions while championing excellence within music, sports, education and the arts. This is made possible thanks to funds such as the Cumberland Educational Foundation, Cumbria Cultural Fund, the Johnson Fund and Live the Dream Fund.

In 2009, Lewis Charlton, originally from Whitehaven, enrolled at The Royal Ballet School in London, where places are offered to only the most talented students.

After five years at the school, Lewis, now 17, is studying drama, media, photography and film at the Arts Educational School in Chiswick, alongside a blossoming performing career. When he returns home, he gives master classes to pupils at a local theatre and dance school, where he developed his talent for five years.

*Lewis has received more than £5,000 from four separate funds, to help him fulfil his ambitions and embrace his talent.*



## MARY GRAVE TRUST CELEBRATES 45TH BIRTHDAY

Travel exposes people to new places and new ideas. For many young people in West Cumbria this is not something that is easily afforded. Local businessman and philanthropist Burton Dunglison was aware of this issue in 1971 when he created the Mary Grave Trust. The issue is as relevant today and through his generosity the trust hands out over £50,000 per year to enable young people to travel abroad.

Most grants fund school trips such as language trips to France and Spain or art and religious studies trips to New York. Other activities supported include work experience in Spain, peer education in The Gambia, a maths winter school in Singapore, sea cadets summer camp in Sweden, an expedition up the Amazon and a guide exchange visit to Eastern Siberia.

*Earlier this year, The Mary Grave Trust marked its 45th birthday with a celebration at Netherhall School in Maryport. Representatives of the trust met young people from Maryport who had travelled to New York with support from the trust.*

# CORPORATE MEMBERSHIP

Around 150 businesses throughout Cumbria support us through challenge and corporate membership, demonstrating their commitment to the local community. Their contribution is vital in supporting our work in helping people and communities in Cumbria. Membership of the Foundation is part of many companies' social responsibility activity.

We involve and engage our members and their staff in events and share with them information about the difference their support makes in the community. We have two categories of membership and 'challenge members', who demonstrate an additional commitment to the Foundation, are offered a discount when purchasing a table at our Annual Celebration and Dinner, and are invited to an exclusive event each year. We enjoy the association with our members and regularly promote their achievements in engaging with local communities.

A number of our members and their employees have chosen to raise funds for the Foundation, either by participating in the Big Sleep, participating in the Rivers Ride cycle sportive to raise funds for our grant-making, or by fundraising with a view to setting up their own fund at the Foundation. We were particularly grateful to our members in the last year for their magnificent support of our 2015 Flood Appeal.

Some members have chosen to become fund holders and benefit from our professional philanthropy services which support them with their giving.



*"Prima Uno is a specialist project planning & project controls consultancy based in Cleator Moor, West Cumbria. We are a unique SME born out of Cumbria and are proud to be associated with CCF, both as members and as donors. We are so pleased that we can support the work of the Foundation in making grants to our communities."*

**Contact Anne Meeghan, Development Assistant if you would like to discuss membership or setting up and building a corporate fund.**

# MAKE A DONATION

## You can make a gift that invests in our communities now and for the future.

To make a donation or apply for membership please fill in this form:

- I would like to make a general donation
- I would like to make a donation to the Winter Warmth Appeal
- I would like to become a challenge member (£750 or £1,500 for businesses over 50 employees)
- I would like to become a corporate member (£200 or £450 for businesses over 50 employees)
- I would like to become an individual (£25) or family member (£50)
- I would like to become a voluntary and community sector member (£15)
- I want to give regularly

You can make payment via BACS (A/C no: 3215 2967 Sort code: 40-16-22) or send a cheque made payable to **Cumbria Community Foundation**

- I have completed the bankers order form overleaf
- I enclose a cheque for £\_\_\_\_\_
- I am a UK tax payer and would like Cumbria Community Foundation to treat my donation as Gift Aid\* until I notify you otherwise

*giftaid it*

**\*Gift Aid.** If you are a UK tax payer, Cumbria Community Foundation can claim a tax re-payment of 25p for every pound donated, as long as you pay income or capital gains tax at least equal to the amount claimed as Gift Aid in the tax year. Higher rate tax payers can claim additional relief.

## YOUR DETAILS

Name

Address

Organisation

Role

Tel No

Email

Signed

Date

We are required under data protection legislation to clarify with you the ways in which you are willing to hear from us. We do not supply our mailing list to any other organisation. We may want to send you additional information about our activities and fundraising opportunities.

I would like to receive this by (please tick):

Mail  Phone  Email  I would not like to receive this

# BANKERS ORDER FORM

## Your full name and address in CAPITALS

.....  
Mr, Mrs, Miss or Title

of (address) .....

..... Postcode .....

request you pay HSBC BANK PLC (40-16-22) Carlisle City Office, Cumbria for the credit of the CUMBRIA COMMUNITY FOUNDATION A/C NO 32152967, quoting ref: ..... (internal use only)

## Amount you wish to pay each year/quarter/month

The sum of: Amount in figures £.....  annually  quarterly  monthly\*  one-off \*tick as required

Amount in words

**Date of payments to start** Starting on the ..... day of..... 20..... until further notice

**Your signature and date** Signature..... Date .....

**Your bank details** To (name of bank) .....

of (address of bank).....

..... Postcode .....

Account No:

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Thank you very much for your support. Please return this form to:

Cumbria Community Foundation, Dovenby Hall, Dovenby, Cockermouth, Cumbria CA13 0PN

# CHALLENGE MEMBERS

*Challenge Members pay a higher rate of membership. In return for the additional support, Challenge Members are invited to an exclusive event every year.*

AMEC Foster Wheeler Nuclear UK Limited

Armstrong Watson

BAE Systems Marine Limited (BCT)

Bay Radio (BCT)

Bender UK Ltd (BCT)

Carlisle Refrigeration (Holdings) Ltd

Carr's Flour Mills Ltd

Carr's Group plc

Costain Oil, Gas & Process Ltd

Direct Rail Services Limited (DRS)

Doosan Power Systems

EH Booth and Co Ltd

Gedye & Sons

Handelsbanken Carlisle

Handelsbanken Kendal

Handelsbanken Penrith

Hertel (UK) Ltd

HSBC Bank PLC UK

J N Murray Ltd (BCT)

Jacobs Stobarts Ltd

Jacobs UK Ltd

James Cropper plc

James Fisher Nuclear Limited

Kevin Roberts

Lake District Estates Co Ltd

Lakeland Limited

Low Level Waste Repository Limited

M-Sport Ltd

Nuclear Decommissioning Authority (NDA)

Nuvia Ltd

Roundhouse Properties

Shepley Engineers Limited

Thomas Graham and Sons Ltd

Ultra Electronics Ltd

Westmorland Limited

Windermere Lake Cruises Limited

*“Cumbria Community Foundation do an excellent job in managing our fund and we are continuing to donate and build it, ensuring our community support can continue for a long time into the future. We believe this type of economic support provides real social benefit, which is something all companies should consider.”*

**Nick Houghton,**  
Managing Director of  
Shepley Engineers, Challenge  
Members and Fundholders

# CORPORATE MEMBERS

Abbey House Hotel (BCT)  
Alhambra Cinema  
Architects Plus (UK) Limited  
Baines Wilson LLP  
Birchwood Farms Ltd  
Bond Dickinson LLP  
Brewin Dolphin Limited  
Britain's Energy Coast Business Cluster  
Burn How Garden House Hotel  
Burnetts Solicitors  
Carlisle Diocese (Church of England)  
Carlisle Refrigeration Ltd  
Carter Jonas LLP  
Castle Green Hotel  
CGP Publications  
CN Group Ltd  
Cowens Ltd  
Cranstons Quality Butchers Ltd  
Cumberland and Westmorland Herald  
Cumberland Building Society  
Cumberland Pencil Company

Cumbria Chamber of Commerce  
Cumbria Waste Management Ltd  
David Allen  
Day Cummins Architects  
Design Promotion and Marketing Ltd  
Designworks (Cumbria) Limited  
Direct Rail Services Limited (DRS)  
Dodd & Co  
Doosan Power Systems  
Eden Housing Association  
English Lakes Hotels Ltd  
Eric Wright Group  
Fastness Data Services Ltd  
Firpress Group Ltd  
Fulcrum Film Ltd  
Florence Madden Associates  
Furness Building Society (Head Office) (BCT)  
Furness Newspapers Ltd (BCT)  
H & H Group plc  
H F T Gough and Co  
Hackney & Leigh

Hertel (UK) Ltd  
Holmegate Farms Ltd  
Houghton-Parkhouse Limited  
HSBC Bank PLC UK  
Hydrocarbon Resources Limited (BCT)  
Ibis Hotel Carlisle  
Iggesund Paperboard (Workington) Limited  
Innovia Films Limited  
J Edgar and Son  
Jacobs Stobbarts Ltd  
Jacobs UK Ltd  
James Fisher Nuclear Limited  
James Walker and Co Ltd  
Jardine Finan Limited  
JL Winder & Co (BCT)  
John Laing Charitable Trust  
Kimberly Clark Ltd (Barrow) (BCT)  
KPMG  
L & W Wilson (Endmoor) Ltd  
Lamont Pridmore  
Lindeth Howe Country House Hotel  
Low Sizergh Barn  
Marston's Beer Company  
McVities

Meldrum Ltd  
Mitchells Auction Company Ltd  
Napthens LLP  
New Balance Athletic Shoes (UK) Ltd  
NFU Mutual (Carlisle)  
North Associates (Cumbria) Ltd  
Northern Security Ltd  
Nuclear Decommissioning Authority (NDA)  
Nuclear Management Partners Limited  
Nuvia Ltd  
Oil States Industries (UK) Ltd Barrow Division (BCT)  
PacTec EPS Ltd  
Park Gate & Company Ltd  
Peill & Co  
Penrillian  
Penrith Building Society  
PFD (Carlisle) Ltd  
Phil Collier Associates (BCT)  
Poole Townsend (BCT)  
Poppi Red Ltd  
Prima Uno  
Progression Solicitors Ltd  
R G Parkins & Partners Limited

Rathbones  
Ravenglass and Eskdale  
Railway Co Ltd  
Rayrigg Estates Ltd  
Risedale at Abbey Meadow (BCT)  
Robert Meacock and Company  
Russell Armer Ltd  
Salvana's Ristorante (BCT)  
Sanlam Private Wealth  
Sarah Nelson's Original Celebrated  
Grasmere Gingerbread Shop  
Sellafield Limited  
Shepley Engineers Limited  
Savills (UK) Ltd  
Smurfit Kappa Composites  
Spedding Dental Clinic  
Story Contracting Ltd  
The Leathes Head Hotel & Restaurant  
Ullswater Navigation and Transit Co Ltd  
Ultra Electronics Ltd  
University of Cumbria  
Warwick Square Osteopaths Limited  
Washington Division of URS  
Corporation  
WCF Ltd (Brampton)  
West Lakes Engineering Ltd

*"By setting up a fund with the Community Foundation, we could tap into their expertise and knowledge to ensure our money was wisely spent and that it was carefully invested so that the income continues to benefit the county for years to come. We have been able to start with a small contribution and add to it on a regular basis."*

**Peter Hensman, Fundholder  
and executive director of  
Lake District Estates**

# GRANT MAKING 2015-16

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**Abbeyfield Carlisle** Over 55 Fund makes grants to benefit people over 55 living in the Carlisle, Allerdale and Eden area. **3 grants, £1,947**

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**Abbeyfield Society Community First** Fund makes grants to benefit people living in the Carlisle, Allerdale and Eden area. **11 grants, £22,770**

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**Alston Moor Community Fund** makes grants for charitable purposes for the benefit of Alston. **1 grant, £1,781**

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**Barrow Community Trust** makes grants for charitable purposes for the benefit of the people of the Borough of Barrow-in-Furness. **8 grants, £5,745**

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**Barrow in Furness Endowment Grassroots Grants** makes grants for charitable purposes for the benefit of the people of the Borough of Barrow-in-Furness. **2 grants, £2,500**

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**Bewcastle Valley Farmers Fund** is donor advised. Supports people living in the Bewcastle area **1 grant, £3,000**

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**Carr's Group Fund** makes grants to invest in the wellbeing of communities across Cumbria. **7 grants, £7,121**

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**Castle Green Grassroots Grants** makes grants for charitable activities for local communities in Kendal and immediate district. **5 grants, £3,150**

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**CN Fund** is donor advised. It makes grants to projects reflecting the interests of the CN group companies. **3 grants, £4,000**

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**Comic Relief** aims to empower local people enabling them to create lasting change in their communities. Priority is given to small, locally based groups in areas of disadvantage. **7 grants, £35,750**

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**Costain Fund** makes grants to community based organisations providing activities that benefit people in Allerdale and/or Copeland. **5 grants, £6,261**

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**Crofton Trust Fund** Grants makes grants to promote the education of the public about agriculture, forestry and the countryside. **2 grants, £3,300**

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**Cumberland and Westmorland Herald** Fund makes grants to community based organisations benefiting people living in the Herald's main circulation area. **1 grant, £1,000**

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**Cumbria Cultural Fund** makes grants to promote excellence in the arts and cultural life. **7 grants, £7,200**

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**Cumbria Endowment Grassroots Grants** prioritises new and smaller organisations supporting older adults, people with mental health needs, children and young people, and people on low incomes. **5 grants, £7,138**

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**Cumbria Flood Recovery Fund 2015** (Groups) raised funds for community organisations supporting people affected by the storms and floods which hit Cumbria in December 2015. The fund was seeded with £50,000 remaining from the 2009 Flood Recovery Appeal. **54 grants, £652,388**

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**Cumbria Flood Recovery Fund 2015** (Individuals) raised funds to aid people affected by the storms and floods which hit Cumbria in December 2015. The fund was seeded with £50,000 remaining from the 2009 Flood Recovery Appeal. **2,798 grants, £2,679,111**

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**Cumbria Industries Amenities Fund** makes grants for activities and equipment which support disabled people in Cumbria. **2 grants, £2,000**

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**Cumbria Young People's Fund** was established by a legacy making grants to benefit children and young people aged 14-22. **9 grants, £30,006**

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**Doosan Babcock Grassroots Grants** makes grants to improve life chances and aspirations in areas where the company's employees reside. **2 grants, £1,350**

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**Dora Beeforth Memorial Fund** makes grants to help disadvantaged young people participate in sport or foreign travel. **4 grants, £1,455**

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**Elizabeth Fell Memorial Trust** makes grants to community based organisations supporting the parish of Kingstown, Carlisle and surrounding area. **2 grants, £1,250**

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**Evening Hill Grassroots Grants** aims to improve the lives of 16-25 years olds or improve the quality of life for the elderly. **5 grants, £4,305**

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**Fairfield Community Fund** makes grants for charitable activities for local communities located close to the Fairfield Wind Farm in North Copeland. **2 grants, £10,000**

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**Foundation grants** prioritises new and smaller organisations supporting older adults, people with mental health needs, children and young people, and people on low incomes. **50 grants, £139,386**

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**Fryer Grassroots Grants** aims to improve the lives of young people leaving care, particularly 16-18 years olds across Cumbria. **3 grants, £3,000**

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**Gibb Charitable Trust Fund** makes grants for vocational training for students and trainees. **1 grant, £700**

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**Glamis Holiday Fund** provides funding to enable a family to go on holiday in Cumbria. **1 grant, £288**

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**Grassroots Cumbria Young Peoples Fund** was established by a legacy making grants to benefit children and young people aged 14-22. **12 grants, £33,347**

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**Hackney & Leigh Fund** makes small grants to tackle disadvantage and strengthen communities in the company's local region. **4 grants, £3,250**

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**Hellrigg Windfarm Community Fund** makes grants for charitable activities for local communities located close to the Hellrigg Wind Farm in North Allerdale. **4 grants, £10,563**

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**High Pow Community Fund** makes grants for charitable activities for local communities in the parish of Bolton to tackle climate change. **1 grant, £2,000**

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**High Sheriff's Crimebeat Fund** supports projects for young people involved in or in danger of becoming involved in anti social behaviour or crime. **13 grants, £15,400**

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**HSBC Fund** makes grants for environmental projects. **3 grants, £3,605**

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**Hunter Davies Fund** is donor advised. It provides bursaries to individuals enabling them to write and publish non fiction books about Cumbria. **1 grants, £500**

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**Janetta Topsy Laidlaw Fund** assists older people in the Carlisle area to remain in their own homes. **2 grants, £2,500**

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**Johnson Fund** makes grants to groups and individuals to promote life skills or artistic excellence of young people and support for carers of people with dementia. **6 grants, £4,710**

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**Kipling Fund** for older people was established by a legacy making grants to benefit older people. **5 grants, £5,149**

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**Kipling Fund** for younger people was established by a legacy making grants to benefit children and young people. **1 grant, £1,110**

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**Kirkby Moor Wind Farm Community Benefit Fund** makes grants for charitable activities for local communities located close to the Kirkby Moor Wind Farm.  
**2 grants, £3,330**

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**Lamont Pridmore Grassroots Grants** aims to improve the lives of people in West Cumbria by raising their aspiration and achievement.  
**1 grant, £1,700**

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**Liddle Thompson** makes grants to community groups whose projects benefit young people in Carlisle and Allerdale.  
**4 grants, £2,267**

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**Live the Dream Fund** makes grants to young people in West Cumbria to enable access to study or vocational training.  
**36 grants, £16,726**

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**Moorhouse Grassroots Grants** makes grants to small projects, particularly in North Cumbria.  
**1 grant, £5,000**

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**Neighbourhood Care Independence Programme** provides funding to enable the elderly and disabled maintain their independence, through support, aids to living, networks and support for carers.  
**2 grants, £45,000** – end of contract final payments. Grants will resume in 2016/17 under Place Based Services.

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**NMP Community Fund (Groups)** aims to improve the lives of people in West Cumbria by raising their aspiration and achievement.  
**33 grants, £450,009**

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**Nuvia Fund** benefits people living near the company site and project offices in Cumbria.  
**1 grant, £2,000**

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**Quarry Hill Grassroots Grants** aims to increase young people's participation in sport, particularly in North Allerdale.  
**5 grants, £12,381**

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**Red Nose Day Community Cash 2015** grants ranging from £500 to £1,000 made to small organisations that are working to help local people living tough lives.  
**11 grants, £9,500**

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**Robin Rigg West Cumbria Fund** makes grants in West Allerdale to support activities that contribute to reducing the effects of climate change and benefit the local community.  
**5 grants, £57,139**

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**Rockcliffe and Westlinton CWM Trust Fund** funds environmental projects in the parishes of Rockcliffe and Westlinton near Carlisle.  
**1 grant, £20,145**

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**Rowan Community First Grants** supports projects which focus on unemployment training for older and young people  
**3 grants, £3,000**

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**Russell Armer** supports community groups in Grange-over-Sands, Kendal and Kirkby Lonsdale.  
**1 grant, £1,000**

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**Shepley Group Grants** makes grants to small projects in areas where its employees reside. **5 grants, £4,500**

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**Solway Fund makes grants** to enable children and young adults in Maryport and Workington to develop skills that equip them for adult life.  
**5 grants, £22,607**

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**Staff 10th Anniversary Fund** is a donor advised fund set up by the Foundation staff. It makes grants for charitable purposes. **1 grant, £500**

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**Stobbarts Ltd Grassroots Grants** makes grants to community based organisations providing activities that benefit people in Allerdale and/or Copeland.  
**2 grants, £2,000**

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**Strummer Calling Community First Grants** makes grants to community based organisations addressing local needs in Cumbria. **5 grants, £5,000**

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**Tallentire Windfarm Fund** makes grants to community based organisations providing activities that benefit people close to the wind farm. **6 grants, £131,938**

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**Thomas Graham Grassroots Grants** aims to increase young people's participation in sport, particularly in Carlisle. **5 grants, £5,000**

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**Ullswater Trust Grassroots Grants** makes grants to groups that benefit a wide range of people, particularly in Eden. **2 grants, £2,500**

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**Violet Laidlaw Trust Fund** makes grants to support homeless people in Carlisle District. **1 grant, £1,000**

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**West Cumbria Endowment Grassroots Grants** makes grants to community based organisations providing activities that benefit people in West Cumbria. **1 grants, £200**

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**Westmorland Ltd Revenue Grants Fund** is a donor advised fund supporting community projects brought forward by Westmorland Ltd staff. **10 grants, £14,777**

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**Wing Cdr H Thompson & Rev Green Grassroots Grants** supports youth organisations in Barrow providing training in leadership, self-discipline, life skills and experience and respect for others. **3 grants, £2,060**

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**Winscales Community Fund** makes grants to community based organisations providing activities that benefit people close to the wind farm. **2 grants, £14,936**

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**William Milburn Trust** makes grants to charitable groups in the Brampton area addressing local needs. **7 grants, £16,734**

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**Winter Warmth Fund** created to help older people in Cumbria stay warm and healthy. **1000 people supported, £119,680**

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**Workington (Ashfield) Lawn Tennis Club** Fund makes grants to provide tennis coaching to young people in Workington and Maryport. **1 grant, £2,150**

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**TOTAL  
GRANTS 3,220  
£4,694,815**



**Youngsters from Phoenix Youth Project in Cleator Moor, supported by the Nuvia Fund**

*“It is important that our money goes to causes which help to ensure long term sustainability for the region - something the Foundation has excellent insight into. They know the area and its people and can highlight avenues where funding will bring the greatest benefit.”*

**Jennie Pearson, Corporate Communications Manager at Nuvia Ltd**



Villagers from the South Lakeland village of Lowick Green transformed a rusted red telephone box into a useful community information point thanks to funding from Evening Hill Grassroots Fund.

*“Cumbrians are very proud but sometimes both young and old need a little help to realise that local projects can improve their quality of life and, in a small way, we are hoping to achieve that by financially supporting the organisations that provide them.”*

**Anonymous Fundholder, the Evening Hill Grassroots Fund**

## FUNDS ADMINISTERED BY CCF

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**Cumberland Building Society Charitable Foundation** makes grants to community based organisations in the Society's operating area.  
**48 grants, £29,048**

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**Holehird Trust** makes grants to community based organisations supporting residents of the former county of Westmorland.  
**24 grants, £35,470**

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**Joyce Wilkinson Trust** supports community groups in the former county of Cumberland, prioritising the parishes of Rosley and Westward. **13 grants, £20,227**

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*Thank you to everyone who has played a role in all that has been achieved, delivered, created in the past 12 months.*

## TRUSTS FOR WHICH CCF IS CORPORATE TRUSTEE

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**Crag House Charitable Trust** is donor advised. Makes grants to specific charities. **11 grants, £7,100**

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**Cumberland Educational Foundation** supports young people under 25 to widen access to sports and the arts.  
**4 grants, £19,000**

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**Dowker Bindloss** makes grants to community based organisations supporting Kendal residents.  
**3 grants, £1,984**

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**Edmond Castle Educational Trust** supports the education and training of disadvantaged young people, prioritising those that are or have been in care.  
**17 grants, £14,813**

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**Mary Grave Trust** makes grants to young people in the former county of Cumberland to support travel abroad.  
**46 grants, £29,510**

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**Westmorland Arts Trust** makes grants to community based organisations to enable residents in the former county of Westmorland to experience the highest quality of music, drama and the visual arts. **9 grants, £14,128**

# FINANCIAL SUMMARY

## Cumbria Community Foundation Year ended 31 March 2016

This information is drawn from the draft accounts of the Foundation for year ended 31 March 2016. The final accounts, audited by Armstrong Watson, will be available from our website.

Incoming resources	£
Donations and legacies	11,181,526
Grant programmes	872,297
Investment income	285,900
Events	38,075
<b>Total income</b>	<b>12,377,798</b>

Resources expended	£
Grant making programmes	5,136,273
Fundraising, publicity	124,373
Events	32,386
Investment costs	37,695
<b>Total expenditure</b>	<b>5,330,727</b>

Surplus for the year composed of:	£
Donated to invest for future grant making	925,734
Revenue grants programmes	6,056,575
Surplus on unrestricted reserves	64,762
<b>Surplus for year</b>	<b>7,047,071</b>

- Advance people's physical and mental health, wellbeing and safety - **£3,315,851**
- Connect people with the arts, culture and heritage - **£44,377**
- Improve life skills, education, employability and enterprise - **£359,996**
- Maximise ability to strengthen community cohesion and build social capacity - **£730,018**
- Promote reduction of isolation and disadvantage and access to local services - **£321,543**
- Transform access to, and engagement with, the environment and public space - **£94,310**



Net assets at 31 March 2016	£
Endowment funds invested for future grant making	10,448,230
Current grants programmes	7,276,286
Core unrestricted funds	349,331
<b>Total assets</b>	<b>£18,073,847</b>

Cumbria Community Foundation is also corporate Trustee of five other endowed charities.

### At 31 March 2016, their net assets were:

Cumberland Educational Foundation	936,666
Dowker Bindloss	25,132
Edmond Castle Educational Trust	290,952
Mary Grave Trust	1,750,435
Westmorland Arts Trust	331,133
<b>Total</b>	<b>3,334,318</b>

# THE TEAM

## **PATRON**

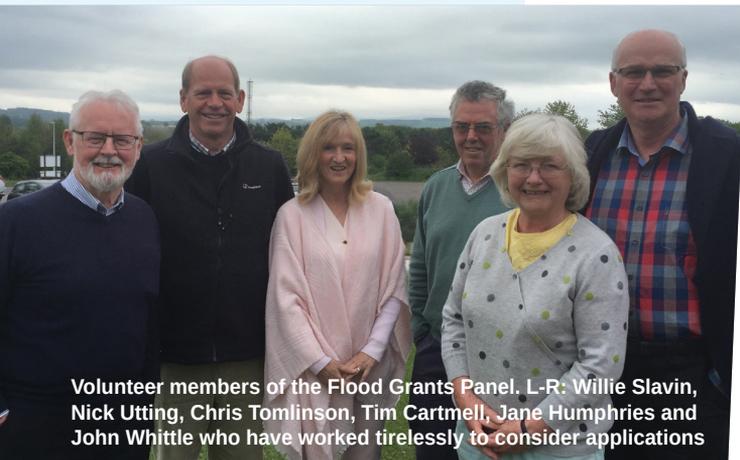
Sir James Cropper KCVO

## **PRESIDENT**

Claire Hensman  
HM Lord-Lieutenant of Cumbria

## **VICE PRESIDENTS**

Lord (Melvyn) Bragg of Wigton DL  
John Fryer-Spedding CBE  
The Right Reverend James Newcome  
Lord Bishop of Carlisle  
Lord Inglewood DL  
Arthur Sanderson OBE DL



Volunteer members of the Flood Grants Panel. L-R: Willie Slavin, Nick Utting, Chris Tomlinson, Tim Cartmell, Jane Humphries and John Whittle who have worked tirelessly to consider applications

## **TRUSTEES**

### **Chair**

Ian Brown DL FCA

### **Vice-Chair**

Tim Cartmell

### **Honorary Treasurer**

Valerie Young

### **Company Secretary**

Tim Cartmell  
Anthony Burbridge  
Robin Burgess OBE DL  
Ian Burke  
Rob Cairns (resigned 19/11/15)  
Mike Casson  
Steve Cockayne  
Tom Foster (resigned 29/04/16)  
Cath Giel  
Jane Humphries  
Tony Keen  
Tim Knowles  
Adam Naylor MBE DL  
Emma Porter  
Richard Roberts  
Willie Slavin  
Sarah Snyder  
Mike Starkie  
Caroline Thomson  
Chris Tomlinson OBE  
John Whittle  
Diane Wood

## **STAFF**

### **Chief Executive**

Andy Beeforth OBE

### **Chief Operating Officer**

Cath Howard

### **Finance Director**

Andrew Benson

### **Finance Officer**

Lynsey Madders

### **Senior Grants and Donor**

### **Services Officer**

Ellen Clements

### **Grants and Donor Services and Communications Officer**

Annalee Holliday

### **Grants & Donor Services Officer**

Nigel Pattison

### **Programme Manager**

David Allford

### **Business Development Manager**

Glenys Kett

### **Development Assistant**

Anne Meeghan

### **Administrator**

Kristine McGlothlin

### **Administrative Apprentice**

Jessica Warren

### **Communications & Marketing Intern**

Lucy Starkie

## FLOOD TEAM

### Flood Fund Manager

Jenny Benson

### Flood Assessor

Vicky Bennett

### Flood Assessor

Sally Elliott

### Flood Assessor

Jacqueline Foster

### Flood Assessor

Caroline Parry-Jones

## GRANTS COMMITTEE

Jane Humphries (Chair)

Willie Slavin (Vice Chair)

Caroline Addison

Hokey Bennett-Jones

Ian Brown DL FCA

Tim Cartmell

Deborah Garnett

Saj Ghafoor

Ruth Guthrie

Heike Horsburgh

Sarah Snyder

Chris Tomlinson OBE

Nick Utting

John Whittle

## WEST CUMBRIA PANEL

Willie Slavin (Chair)

Cath Giel (Vice Chair)

Sandy Brown

Cllr John Kane

Valerie Hallard

Cllr Konrad Hansen

Roger Hart

Cllr Keith Hitchen

Peter Johnstone

Paul Rowe

Chris Shaw

Cllr Alan Smith

## COMBINED BARROW COMMUNITY TRUST AND GRANTS COMMITTEE

Rob Cairns DL (Chair)

Tony Burbridge (Vice Chair)

John Calvert

Steven Casson

Pauline Charnley

John Dennis

Ed Elvish

Mayor Anita Husband

Michelle Knott

Derek Lyon

Wendy Maddox



# FRIENDS OF THE 597

A Windermere bus service scrapped by Cumbria County Council has continued to operate, thanks to the dedication of local residents.

'Friends of the 597' was set up by a group of volunteers from the South Lakeland town, with the aim of raising funds to maintain the 597 bus service which runs a circular route through Windermere and Bowness. Friends of the 597 received a grant of £1,000 from the Holehird Trust, which has enabled them to sustain the bus service.

Many older, vulnerable people, some of whom have mobility and health problems, have been encouraged to use the bus so they feel part of the wider community and can continue being independent.

One elderly lady who does not drive, has benefited greatly from the 597 bus service. She said: "I am thrilled that I am able to access the 597 several times a week to get to the Health Centre, go shopping and to my weekly hairdresser appointments. I can also keep in contact with my friends. The 597 has been my lifeline."



# BREWIN DOLPHIN

As one of the largest independently-owned private client investment managers in the UK, with 35 offices and a local branch in Penrith, Brewin Dolphin is delighted to support Cumbria Community Foundation

Cumbria Community Foundation,  
Dovenby Hall, Dovenby, Cockermouth,  
Cumbria CA13 0PN  
Tel: 01900 825760 Fax: 01900 826527  
Email: [enquiries@cumbriafoundation.org](mailto:enquiries@cumbriafoundation.org)  
Web: [www.cumbriafoundation.org](http://www.cumbriafoundation.org)

Cumbria Community Foundation is a charitable company limited by guarantee.  
Company No 3713328. Registered in England and Wales.  
Registered Charity No 1075120.  
**Cumbria Community Foundation is quality accredited by the Community Foundation Network to standards endorsed by the Charity Commission**



Young Zac exploring the wildlife and nature found in, on, and by the river Eden as part of a £5,000 grant from the Moorhouse Charitable Trust to Eden Rivers Trust