



CUMBRIA
COMMUNITY FOUNDATION

ANNUAL REVIEW 2017
A COUNTY OF CONTRASTS



Introduction

Cumbria Community Foundation exists to address disadvantage by making life-changing grants and promoting philanthropy. We are also here to respond to emerging need, having managed four disaster appeals, most recently raising £10.3m in response to the floods in 2015.

We provide philanthropic services to individuals, families and organisations and manage 60 grantmaking funds, supporting more than 500 community projects per year on behalf of our fundholders. Since 1999, we have invested more than £37m into almost 4,000 groups and 8,000 individuals.

We provide a simplified approach to effective charitable giving. As one of the UK's leading, accredited community foundations, we have the expertise and local knowledge to help individuals, families, companies, charitable trusts and public-sector bodies invest in their communities.



Connecting people who care with causes that matter

Chairman's Statement



I became Chair of the Foundation in December 2016 and I would like to thank my predecessor, Ian Brown, who has been a great support.

Although this year has seen the greatest value of grants awarded in the Foundation's history, our review and compilation of statistics on need in the county, published in a new report 'Cumbria Revealed', has highlighted wide-ranging community needs. We have therefore set targets to double both our endowment and our annual grantmaking by 2022 and have set new grantmaking priorities:

- Improving the lives of disadvantaged children and families
- Improving the life skills, education, employability and enterprise of disadvantaged people
- Supporting vulnerable older people
- Improving the health and wellbeing of the people of Cumbria
- Strengthening and supporting fragile communities
- Enabling people to access arts, sports, culture, heritage and the environment

We continue to help the flood-affected people of Cumbria. The Flood Fund has helped over 3,000 households recover, supported flood-affected community groups and invested in household and community preparedness for future

flooding. The work of our Flood Grants team was highly commended in the Grantmaking category of the 2017 Charity Awards.

We welcomed several significant new funds in the year and were delighted that Sellafield Ltd chose to use our knowledge and expertise for their Community Choices programme which invested over £500,000 in charities and community groups.

On a sad note, 2017 saw Cumbria and the Foundation lose an inspirational and dedicated leader with the death of our former chairman, James Carr, philanthropist, businessman, farmer, conservationist and fisherman, who will be sadly missed.

We have set ambitious targets to grow philanthropic giving in the county. I am confident that people will respond positively to enable us to continue high quality grantmaking to support many more life-changing projects.

A handwritten signature in black ink that reads "David Beeby". The signature is written in a cursive, flowing style.

David Beeby – Chairman

Cumbria Revealed



The scenery that draws people to Cumbria from around the world is also home to people who are isolated and experience real hardship. The picture-postcard image of Cumbria masks poverty in many areas. For every outwardly comfortable community there are clusters of individuals and families living in poverty.

We recently published Cumbria Revealed, which collected data from various sources and paints a picture of the county, focusing on what life is really like for many people. One in five Cumbrians has a long-term health problem or disability. 32,000 pensioners in the county live alone. Almost 12,000 children live in poverty.

The report explores the underlying and poorly known social problems in the county and highlights inspirational community projects which are helping to tackle these problems with the funding they receive from the Foundation.

The report's findings are intended to raise awareness of these problems, and to tackle them by matching people with causes that matter to them.

Understanding the needs of a community and the issues it faces are the first steps to being able to solve them and has led us to identify our grantmaking priorities for the next five years:

- Improving the lives of disadvantaged children and families
- Improving the life skills, education, employability and enterprise of disadvantaged people
- Supporting vulnerable older people
- Improving the health and wellbeing of the people of Cumbria
- Strengthening and supporting fragile communities
- Enabling people to access arts, sports, culture, heritage and the environment

Chief Executive of the Foundation, Andy Beeforth, said: "We hope Cumbria Revealed will encourage more philanthropy, more giving, and match directly the help with the need. If we can bring attention to the problems we have in the county and innovative ways in which they can be addressed, then the report will change lives and create a better future for Cumbria."

To read the report, visit www.cumbriafoundation.org or call the office for a copy

Susan's Farm

Children from the most disadvantaged backgrounds finish secondary school effectively more than two years behind their wealthier peers, according to a recent report by the Education Policy Institute, and becomes more prominent in rural areas across Cumbria.



Susan's Farm in Houghton, Carlisle is a social enterprise, offering placements and skills training in land-based qualifications to address this issue.

The working farm has received almost £15,000 in grant funding from the Foundation, and provides opportunities and support for people at different stages of their lives. A number of school age

students attend one day a week to gain practical experience for their qualifications; people living in residential care homes visit to feed the hens and make jam; and vulnerable adults volunteer at the farm to build their skills, confidence and health, while undertaking qualifications in land-based studies, working in conjunction with Newton Rigg College.

Susan Aglionby, Director, said: "We are delighted with the progress Nathan has made on the farm. He has grown in confidence and self-esteem as well as gaining skills in working with the cattle and sheep. He stayed late one evening to help with hay making. He worked really hard stacking bales and was delighted to receive some 'pocket money', which was richly deserved."

15 year old Nathan had a difficult upbringing and his engagement at school was poor. His teacher approached Susan as it was felt that he would enjoy the environment of the farm, and in turn his approach to learning would change. Funding enabled Nathan to attend an extra day a week, undertaking a BTEC Level 1 in Animal Care, where he is taught practical skills, as well as record keeping, reading and writing. Nathan's attendance

at school has since increased by more than 50% and his teachers are delighted with his commitment.

Carlisle-based agriculture, food and engineering business, Carr's Group, set up their fund, which has supported the farm, in 2015. Neil Austin, Group Finance Director said: "Our passion for the county and local people has meant we have supported many local causes over a number of years. We have been corporate members of the Foundation for a while, and creating our own fund, managed by the Foundation, was the natural extension to this. By doing this we can benefit from the Foundation's knowledge in assessing worthy projects so we can be sure that the money is being channelled to the places where it can be most effective and to causes we care about."



GCSE attainment is worse than the national average for England

With Singing in Mind

With Singing in Mind was set up to continue an initiative previously run by the Alzheimer's Society, which owing to a lack of funding was set to stop. A group of dedicated volunteers and trained professionals joined together to form a new singing group, with support from the Johnson Fund.

Based in Kendal's Hallgarth Community Centre, the group works with people who live with a neurodegenerative condition such as motor neurone disease, dementia, stroke and Parkinson's disease.

Supported by volunteers, the weekly sessions help to stimulate long-term memory. Participants sing familiar songs and learn new ones while strengthening co-ordination and brain and body connection using equipment such as a parachute, beanbags, hand bells.

Eddie Harrison, Secretary, said: "The grant helped to maintain the weekly sessions, which enabled the majority of people attending to show some improvement in their communication skills and to mix with others as a group."



One gentleman, who is recovering from a stroke, has since seen improvements with his speech. His wife said: "The atmosphere is so heart-warming and friendly and it's wonderful to have the opportunity to meet with both carers and those with similar needs to my husband."

The Johnson Fund was set up by Jim and Eve Johnson in 2015. Its focus is to develop the self-esteem and confidence of young people, and to provide support to carers of sufferers from dementia as well as those whose lives have taken a major unforeseen turn for the worse.

Jim said: "Eve and I are both keen singers, and we know from personal family experience that knowledge of music and song is one of the last retentive

faculties to remain active when other elements fail".

"Having also been involved since retirement as finance director of national charities which support the development and leadership of, particularly choral, amateur music-making in the UK, I can appreciate the practical implications of anything which can minimise the effects of dementia, and improve the quality of life of our increasingly ageing population."

**1,800 people
are diagnosed
with dementia
each year**



Barrow Domestic Appliances

In Barrow-in-Furness, over half the population is categorised as financially stretched, meaning that people are on incomes well below average, with many experiencing some degree of financial pressure. Unemployment is particularly high among young people, with some wards having levels at five times the national average.

Barrow Domestic Appliances is a social enterprise providing low cost domestic appliances to people on low incomes across the Furness peninsula. It repairs and recycles unwanted electrical appliances and stops them from being sent to landfill. Appliances are made available to local people at low prices, with further discounts for those on a range of benefits.

The organisation also supports people whose skills and confidence are so low they have real challenges finding a job by providing training and experience to volunteers to help them back into work.

The organisation has received funding from the Barrow Community Trust and the



Cumbria Fund, which Peter and Claire Hensman support through their fund.

Peter said: “We wanted to set up the fund because one of Cumbria’s great strengths is its many wonderful communities which support the vital fabric of our lives. These frequently need funding to help them with their work. 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.”

Graham Miller, Director of Barrow Domestic Appliances, said: “Barrow has

a relatively high unemployment rate, with the latest figures showing that it is continuing to rise. If we are to increase the number of people who are in work, we must ensure that people have the relevant skills, experience and qualifications to improve their chances of gaining permanent roles.”



1 in 8 households have an income of less than £10,000 a year

Northern Fells Group

The proportion of older people living in Cumbria is increasing at a much faster rate than most parts of the country. Since 2004, the number of residents aged 85 or older has increased by more than a third - one of the highest rates of growth in the country.

The proportion of older people is generally higher in our more rural areas, where access to services is far more challenging.

The Northern Fells Group was launched by Prince Charles under the name of the Northern Fells Rural Project in 1999. It is a catalyst for and home to a range of community projects which serve a large rural community on the northern fringe of the Skiddaw and Blencathra fells. A small number of staff and more than 100 volunteers run the community transport scheme, lend-a-hand and village agent scheme, Men in Sheds project, the youth group, benefits advice service and lunch and exercise clubs for older people.

The Men in Sheds project runs twice a week and helps mainly older local residents build, repair and recycle in the

community workshop. Activities involve woodworking, furniture restoration and upholstery, bike and vehicle repairs, tool renovation, model engineering and gardening.

The charity has received more than £110,000 funding from the Foundation, including a grant from the Rowan Community First Fund. The donor behind the fund said: "I am particularly pleased to be able support charitable projects throughout Cumbria. I feel that rural areas often get overlooked where the population is sparse and family incomes are not high. I set up my fund with the Foundation as it supports a very varied number of charitable projects."

Jenny Bland, Chair of the Northern Fells Group, said: "The funding has allowed us to deliver essential services to older people by providing companionship, practical support and opportunities to engage in a range of community activities. It has allowed us to meet current and future demands, helping to combat rural social isolation and exclusion, alleviate deprivation, improve access to other services and enable older people to remain independent, living in their own homes."



**25% will be
aged over
65 in 2020**

AWAZ Cumbria

Cumbria's ethnic minority populations are small and some people experience isolation as a result. We also have a vibrant visitor economy which relies heavily on a migrant workforce. The introduction of people from different countries, some with different customs and religions and some with limited language skills can create challenges for communities and local services.

Carlisle Unity Festival is an annual event to promote integration, foster good relations and celebrate all that people have in common as residents of a diverse and vibrant county. Organised by AWAZ Cumbria, the festival, which takes place in July and is free to attend, aims to tackle marginalisation of individuals and groups in the local community.

Supported by a grant from the CN Fund, the one-day event brings together a range of organisations including Cumbria Partnership NHS Foundation Trust, Cumbria Constabulary, the University of Cumbria, and local community groups such as Carlisle One World Centre and



Carlisle Mencap. The festival offers family entertainment, performances and workshops as well as information stalls.

Peter Foley MBE, Chair of AWAZ Cumbria, said: “By working together to tackle discrimination and prejudice, we will make Cumbria a place where everyone is welcome to live, learn, work, and visit. We want communities to respect and celebrate ethnic and cultural diversity, while maintaining their heritage and promoting understanding.”

The Cumbrian Newspaper Group, who donated £100,000 to set up the CN Fund in 2000, was our first corporate donor. Robin Burgess, a former trustee of the Foundation and Chairman of the Carlisle-based local media business, said: “We have always been very involved in the local communities we serve with our various titles and we set up the fund so that there could be a long-term benefit. We have now over the years made some varied and substantial grants to organisations which we both enjoyed doing and have found to be useful public relations for our titles.”

Winter Warmth Appeal and Big Sleep

Hundreds of older people across our county are in danger of becoming ill each year due to the effects of the cold weather. The Winter Warmth Appeal was launched in 2010 and has raised more than £530,000 to help thousands of older people stay warm and healthy during the winter.

Our annual Big Sleep fundraiser was launched in 2014 and has raised £100,000 since inception. In January 2017, more than 130 people were sponsored to sleep outside on the shores of Lake Windermere where temperatures dropped below freezing. The event attracts sleepers from all walks of life with the oldest participant aged 69. This year, more than 50 youngsters joined their parents and children as young as four fundraised for the cause.

Sian Littlemore, who entered with her partner and three children Iona, 6, Izak, 9, and Owen, 13, said: "The children had been telling their friends and teachers about it in the lead-up to the event and they understand that this helps older members of our community who often have to choose between heating and eating".

"It's a very genuine problem and where we live people can get very wet and cold. If they have been outside and can't get warm inside their own home it is potentially a killer.

People should be safe in their own homes and this is an important way to raise awareness for the older members of our community who need that extra bit of support."

Sheila is 75 and lives alone in a one bedroom flat in Carlisle. She receives pension credit and benefited from the appeal. Sheila knows how difficult it can be for people in her position. She said: "I only put the heating on when it's really cold, for about half an hour, just to warm the place up. You definitely feel the cold more as you get older.

"I can understand how some people are frightened to put the heating on, or go without food. You never know what the bills are going to be. Sometimes it's not too bad, other times you get a shock."

If you'd like to sleep out on the shore of Lake Windermere for the next Big Sleep on Saturday 27th January 2018, you can sign up via www.cumbriafoundation.org/bigsleep



Cumbria Flood Recovery Fund

Cumbria's worst ever flooding incident occurred after Storm Desmond brought record-breaking rainfall to the county in December 2015. More than 5,500 households and 1,000 business properties were flooded; leaving thousands of people homeless and affecting many more through loss of income.



The Cumbria Flood Recovery Appeal raised £10.3m thanks to generous donations from individuals, charitable trusts, businesses and match funding from the government. To date, more than £9.2 million has been awarded, supporting over 3,000 households. Almost £3 million has been invested in resistance and resilience measures for households and communities, to help minimise the extent of damage in the future.

The fund has not only helped residents with practical, financial and emotional support, it will also help to lay stronger foundations for future recovery programmes across the county. For example, volunteer coordinators have been funded in Keswick, Cockermouth and Kendal to support the work of the local community emergency response groups.

As part of the evaluation of the fund, we received an exceptional response to our survey with more than 90% of the 900 respondents stating that they felt the Foundation understood their needs and that their grant had helped them recover from the floods.

“It was a massive help. We couldn't get insured and lost everything downstairs as we didn't have enough time to move things. We were worried about how we would find the money to replace the things we lost and the grant eased the stress and anxiety and helped us replace the things we lost.”

“Without the grant, I would have been homeless, housed in temporary accommodation unsuitable for my disability for months. The Foundation made me feel human.”

The Cumbria Flood Recovery Fund was highly commended in the category of grantmaking and fundraising at the national Charity Awards 2017.

To find out more about the Cumbria Flood Recovery Fund visit www.cumbriafoundation.org



Cumbria Housing Partners

Cumbria Housing Partners has established a fund offering financial support to social housing tenants across Cumbria.

The fund is worth £100,000 each year and has already awarded more than £35,000. Grants of up to £10,000 are available to community and voluntary organisations running projects aimed at improving people's employability or education. Activities which provide advice and guidance, support and engage people in their local community and improve community facilities will also be considered.

Grants of up to £500 are also available to individuals aged 16 or over who wish to undertake work-based education or training to improve their employability.

Sheila Moffat, Manager of Home to Work, which received £10,000 towards the Skills 4 You employment project

Barrow Community Trust

Funds for the Barrow area are managed by the Barrow Community Trust which is a committee of the Community Foundation dedicated to supporting the Borough. The Trust is supported by a number of businesses in the area, including BAE Systems, Bender UK, and Poole Townsend who are all members of the Foundation.

The Trust is chaired by local businessman Tony Keen. Tony's family has been active in business in the town for two generations and Tony wants to see more local people and families support the local community through the Community Foundation and Barrow Community Trust. Tony said "Barrow is a very special place to live and work in but it also has some serious challenges. I want the Barrow Community Trust to secure significant new funds to invest in education and young people in the town because they are our future."

Furness Homeless Support Group received £2,000 to renovate a three-bedroom house in Hindpool to provide supported accommodation. Residents can stay in the property until they are ready to find their own tenancy and move



on to independent living. The house is located near the charity's main base on Bath Street and the men will work with a dedicated support team covering budgeting, debt reduction, living skills, accessing health care, healthy cooking, and liaising with specialised agencies regarding alcohol and drug misuse and mental health services.

Patricia Chapples, Manager, said: "The grant has made a world of difference. All three residents are debt free and through working with us, are budgeting well. They are constantly developing skills and confidence and learning to live more independently with ongoing support."

Above: (l-r) Residents Marc Griffiths, John Atkinson and Andy Clark, who were all previously homeless, in the kitchen at the house.

Leaving Money Locally



We know that your family and friends will be first in your thoughts when considering your will, but after taking care of them, many people choose to support the causes they most care about through a gift to charity in their will.

Leaving a gift in your will to Cumbria Community Foundation allows you to leave money to support the people and places you most care about. We accept donations of all sizes and invest these gifts to provide a permanent source of income for grant making. Since 1999 we have invested more than £37m into almost 4,000 groups and 8,000 individuals.

Cumbria Community Foundation offers the ideal way to leave a local legacy efficiently and easily, with a number of options available to ensure that your legacy achieves exactly what you want it to. We provide a uniquely flexible range of options and support to all our donors.

We manage a number of themed funds. You could choose to leave some money to an existing fund which already supports a subject close to your heart (see our Grantmaking pages 20-24 for details of those funds). Alternatively, for gifts of over £50,000, we can create a fund bearing a name of your choosing and with specific purposes.

Please speak to your solicitor about the type of gift you would like to make or contact us for more information on the types of funds and how they work.



Cumbria Young People's Fund

The Cumbria Young People's Fund was established thanks to the generosity of a retired teacher who cared passionately about helping young people. He left £1.2m in his will to support young people between the ages of 14 and 22 directly, as well as groups working with young people throughout Cumbria.

One project to benefit is Cowran Training, a working farm in Pennington, near Ulverston, which offers a range of hands-on training and educational opportunities for schoolchildren and disadvantaged young people and adults.

The charity received £7,000 from the fund to develop a special 24 week 'work challenge' programme that provides opportunities for young people to get involved with all aspects of running a farm – from animal husbandry to growing vegetables and running the farm shop – and ends with nationally recognised qualifications.

Corporate Membership

We are proud that so many Cumbrian businesses, large and small, and from all around the county, choose to support us and our work helping people and communities in Cumbria through their membership of the Foundation. Around 130 businesses throughout the county demonstrate their commitment to their local communities through their membership.

This year, as a thank you to them for their support, and with kind sponsorship from members Ullswater Steamers and Gedye & Sons, we invited our corporate members on an evening cruise on Ullswater which took place on 6 July 2017.

We have two categories of corporate 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. Members are listed in our Annual Review and on our website.

A number of our members and their staff have chosen to raise funds for the Foundation, either by participating in the Big Sleep raising money for our Winter Warmth Fund, participating in other activities to raise funds for our general grantmaking, or by fundraising with a view to setting up their own fund at the Foundation. Other members have sponsored our events, for which we are extremely grateful, and which we hope proves beneficial to them as well as to us.

Martyn Wrightson, Partner and Head of Wills, Probate & Trusts Team from members Burnetts Solicitors, said: "I am pleased that, for a number of years now, I have been able to point clients towards Cumbria Community Foundation as the recipient of their charitable giving. CCF could be regarded as "a big fish in a small pond" and as such is able to diversify its funds. Whether funding the repairs to a village hall for the benefit of relatively few or administering a flood disaster appeal for the benefit of many thousands, no project is too small nor too large so long as it benefits Cumbria."

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



Corporate Members, Peter Martin from Brewin Dolphin, Amyn Fazal from Penrith Building Society and Richard Dawson from Rathbone Investment Management who joined us on the Ullswater Steamers during the summer.

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

***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.

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Your Details

Name

Address

Organisation

Role

Tel No

Email

Signed

Date

We would like to send you additional information about our activities and fundraising opportunities. I would like to receive this by (please tick):

- Newsletters by e-mail
- Fundraising requests by e-mail
- Fundraising requests by phone

Bankers Order Form

Your full name and address in CAPITALS

.....
Mr, Mrs, Miss, Ms 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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Sort Code:

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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	James Cropper plc
Armstrong Watson	Kevin Roberts
BAE Systems Marine Limited (BCT)	Lake District Estates Co Ltd
Bay Radio (BCT)	Lakeland Limited
Bender UK Ltd (BCT)	Low Level Waste Repository Limited
Carlisle Refrigeration (Holdings) Ltd	M-Sport Limited
Carr's Group plc	Roundhouse Properties
Cohens Group	Sellafield Limited
EH Booth & Co Ltd	Thomas Graham & Sons Ltd
Gedye & Sons	WCF Ltd (Brampton)
Handelsbanken Carlisle	Westmorland Limited
Handelsbanken Kendal	Windermere Lake Cruises Limited
Handelsbanken Penrith	



“We are delighted to support Cumbria Community Foundation, which has provided crucial assistance and funding for thousands of worthy causes across the county.

“We’re very much committed to supporting the local community and the foundation is very close to the hearts of many James Cropper employees. Our former Chairman and namesake Sir James Cropper is the current patron of the charity, and has witnessed first-hand the tremendous work the foundation is responsible for.”

Phil Wild, CEO of James Cropper plc

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

Carlisle Refrigeration Ltd

Carr's Flour Mills Ltd

Carter Jonas LLP

Castle Green Hotel

Centrica E & P (BCT)

CGP Publications

CN Group Ltd

Cowens Ltd

Cranstons Quality Butchers Ltd

Cumberland & 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

Florence Madden Associates

Fulcrum Films Limited

Furness Newspapers Ltd (BCT)

H & H Group plc

H F T Gough & Co

Hackney & Leigh

Hertel (UK) Ltd

Holmeate Farms Ltd

Houghton-Parkhouse Limited

Ibis Hotel Carlisle

Iggesund Paperboard (Workington) Limited

Innovia Films Limited

J Edgar & Son

J L Winder & Co (BCT)

Jacobs Stobbarts Ltd

Jacobs UK Ltd

James Cropper plc

James Walker & Co Ltd

Jardine Finan Limited

KPMG LLP
L & W Wilson (Endmoor) Ltd
Lamont Pridmore
Lindeth Howe Country House Hotel
Low Sizergh Barn
McVities
Meldrum Ltd
Mitchells Auction Company Ltd
Naphthens LLP
New Balance Athletic Shoes (UK) Ltd
NFU Mutual (Carlisle)
Northern Security Ltd
Nuclear Decommissioning Authority (NDA)
Nuvia Ltd
Oil States Industries (UK) Ltd Barrow
Division (BCT)
Park, Gate & Company Ltd
Penrillian
Penrith Building Society
PFD (Carlisle) Ltd

Pirelli Tyres Limited
Poole Townsend (BCT)
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 & Company
Russell Armer Ltd
Saker Solutions Ltd
Salvana's Ristorante (BCT)
Sanlam Private Wealth
Sarah Nelson's Original Celebrated
Grasmere Gingerbread Shop
Savills (UK) Ltd
Shepley Engineers Limited
Smurfit Kappa Composites
Spedding Dental Clinic

Story Contracting Ltd
The Leathes Head Hotel & Restaurant
Thomson Hayton Winkley
Ullswater Navigation and Transit Co Ltd
Ultra Electronics Ltd
University of Cumbria
Warwick Square Osteopaths Limited
West Lakes Engineering Ltd



Staff from Eden Housing Association raising money for the Winter Warmth Appeal.

Grant Making 2016-17

2016 Sport Relief Community Cash makes grants to small organisations that are working to help local people living tough lives. **12 grants, £10,154**

Abbeyfield Carlisle Over 55 Fund makes grants to benefit people over 55 living in the Carlisle, Allerdale and Eden area. **11 grant, £17,784**

Abbeyfield Society Community First Fund makes grants to benefit people living in the Carlisle, Allerdale and Eden area. **5 grants, £7,815**

Aspatia Community Asset Fund makes grants for charitable purposes for the benefit of Aspatia and surrounding district, prioritising older adults, people with mental health needs and people with disabilities. **1 grant, £6,800**

Barrow Community Trust makes grants for charitable purposes for the benefit of the people of the Borough of Barrow-in-Furness. **9 grants, £12,010**

Barrow in Furness Endowment Grassroots Grants makes grants for charitable purposes for the benefit of the people of the Borough of Barrow-in-Furness. **4 grants, £3,950**

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

Broughton Moor Windfarm Fund makes grants for charitable activities for local communities located close to the Broughton Moor wind farm. **2 grants, £2,620**

Carr's Group Fund makes grants to invest in the wellbeing of communities across Cumbria. **2 grants, £3,000**

Castle Green Grassroots grants, makes grants for charitable activities for local communities in Kendal and immediate district. **2 grants, £1,854**

CN Fund is donor advised. It makes grants to projects reflecting the interests of the CN group companies. **6 grants, £8,000**

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. **9 grants, £25,296**

Crofton Trust Fund grants makes grants to promote the education of the public about agriculture, forestry and the countryside. **1 grant, £2,000**

Cumbria Cultural Fund makes grants to promote excellence in the arts and cultural life. **3 grants, £1,777**

Cumberland Educational Foundation supports young people under 25 to widen access to sports and the arts. **3 grants, £3,480**

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. **6 grants, £5,029**

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. **103 grants, £1,208,123**

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. **1,922 grants, £3,547,945**

Cumbria Fund prioritises new and smaller organisations supporting older adults, people with mental health needs, children and young people, and people on low incomes. **57 grants, £157,912**

Cumbria Industries Amenities Fund makes grants for activities and equipment which support disabled people in Cumbria. **2 grants, £1,500**

Cumbria Young People's Fund was established by a legacy making grants to benefit children and young people aged 14-22. **18 grants, £66,537**

Doosan Babcock Grassroots grants makes grants to improve life chances and aspirations in areas covering where employees reside. **1 grant, £825**

Dora Beeforth Memorial Fund makes grants to help disadvantaged young people participate in sport or foreign travel. **6 grants, £3,087**

Dowker Bindloss makes grants to community based organisations supporting Kendal residents. **2 grants, £1,000**

Edmond Castle Educational Trust supports the education and training of disadvantaged young people, prioritising those who are or have been in care. **16 grants, £12,740**

Elizabeth Fell Memorial Trust makes grants to community based organisations supporting the parish of Kingstown, Carlisle and surrounding area. **2 grants, £2,865**

Evening Hill Grassroots grants aims to improve the lives of 16-25 years olds or improve the quality of life for the elderly. **2 grants, £1,500**

Fairfield Community Fund makes grants for charitable activities for local communities located close to the Fairfield Wind Farm in North Copeland. **1 grant, £3,800**

Fryer Grassroots grants aims to improve the lives of young people leaving care, particularly 16-18 years olds across Cumbria. **7 grants, £8,445**

Gibb Charitable Trust Fund makes grants for vocational training for students and trainees. **1 grant, £1,000**

Grassroots Cumbria Young Peoples Fund was established by a legacy, making grants to benefit children and young people aged 14-22. **8 grants, £23,065**

Hackney & Leigh makes small grants to tackle disadvantage and strengthen communities in their local region. **5 grants, £4,500**

Hellrigg Windfarm Community Fund makes grants for charitable activities for local communities located close to the Hellrigg Wind Farm in North Allerdale. **8 grants, £18,290**

High Pow Community Fund makes grants for charitable activities for local communities in the parish of Bolton to tackle climate change. **1 grant, £8,676**

High Sheriff's Crimebeat Fund supports projects for young people involved in or in danger of becoming involved in antisocial behaviour or crime. **8 grants, £7,800**

HSBC Fund makes grants for environmental projects. **3 grants, £2,050**

Hunter Davies Fund is donor advised. It provides bursaries to individuals enabling them to write and publish non-fiction books about Cumbria. **2 grants, £1,646**

Janetta Topsy Laidlaw Fund assists older people in the Carlisle area to remain in their own homes. **2 grants, £2,640**

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. **4 grants, £3,000**

Kipling Fund for older people was established by a legacy, making grants to benefit older people. **5 grants, £2,917**

Kipling Fund for younger people was established by a legacy, making grants to benefit children and young people. **2 grants, £1,000**

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, £3,632**

Lamont Pridmore Grassroots grants aims to improve the lives of people in West Cumbria by raising their aspiration and achievement. **3 grants, £4,000**

Liddle Thompson makes grants to community groups whose projects benefit young people in Carlisle and Allerdale. **1 grant, £923**

Live the Dream Fund makes grants to young people in West Cumbria to enable access to study or vocational training. **34 grants, £30,488**

Mary Grave Trust makes grants to young people in the former county of Cumberland to support travel abroad. **71 grants, £49,604**

Nuvia Fund benefits people living near the company site and project offices in Cumbria. **2 grants, £3,260**

Older People's Fund (Cumbria) makes grants to reduce social isolation and increase local community participation. **5 grants, £37,442**

Placed Based Services provides funding to enable the elderly and disabled maintain their independence, through support, aids to living, networks and support for carers. **7 grants, £940,182**

Quarry Hill Grassroots grants aims to increase young people's participation in sport, particularly in North Allerdale. **5 grants, £6,500**

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. **7 grants, £68,045**

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

Russell Armer supports community groups in Grange-over-Sands, Kendal and Kirkby Lonsdale. **3 grants, £3,061**

Shepley Group grants makes grants to small projects in areas covering the employee residence. **10 grants, £9,665**

Solway Fund makes grants to enable children and young adults in Maryport and Workington to develop skills that equip them for adult life. **2 grants, £13,712**

Stobbarts Ltd Grassroots grants makes grants to community based organisations providing activities that benefit people in Allerdale and/or Copeland. **2 grants, £1,089**

Strummer Calling Community First grants makes grants to community based organisations addressing local needs in Cumbria. **3 grants, £2,777**

Swales Trust Fund grants to students being educated for the farming, forestry and horticultural industry. **5 grants, £1,300**

Tallentire Windfarm Fund makes grants to community based organisations providing activities that benefit people close to the wind farm. **2 grants, £46,834**

The Dulverton Trust makes grants to community based organisations to assist youth opportunities, general welfare, conservation and preservation. **22 grants, £103,500**

Thomas Graham Grassroots grants aims to increase young people's participation in sport, particularly in Carlisle. **7 grants, £14,597**

Ullswater Trust Grassroots grants makes grants to groups that benefit a wide range of people, particularly in Eden. **4 grants, £4,980**

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

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. **7 grants, £9,825**

Westmorland Ltd Revenue grants Fund is a donor advised fund supporting community projects brought forward by Westmorland Ltd staff. **3 grants, £2,350**

William Milburn Trust makes grants to charitable groups in the Brampton area addressing local needs. **3 grants, £7,500**

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. **1 grant, £1,000**

Winter Warmth Fund created to help older people in Cumbria stay warm and healthy. **5 grants, £125,078**

Workington (Ashfield) Lawn Tennis Club Fund makes grants to provide tennis coaching to young people in Workington and Maryport. **1 grant, £2,675**



Sixteen year old Megan, from Carlisle, competes for Carlisle Aspatria Athletics Club and Giffnock North Amateur Athletic Club and has received £1,790 towards kit, equipment, travel and coaching costs to help her on her way to becoming an international sports star.

She recently represented England for the first time in the home international event and won gold in the long jump at the Scottish National Indoor Athletics Under-17s Championships, which took Megan to the top of the UK rankings.

Reflecting on her daughter's recent achievements, Megan's mum, Angela, said: "Megan has made such a massive improvement this year in her chosen sport that she was nominated as Sports personality at her school. The funding has been a huge help as it has taken the expectation off me as a parent, due to equipment being so expensive."

Funds administered by CCF

Community Choices Programme

offering community based organisations the opportunity to apply for funding, decided by the public via an online voting process. **19 grants, £580,530**

Cumberland Building Society

Charitable Foundation makes grants to community based organisations in the Society's operating area. **53 grants, £25,728**

Fresh Ideas Fund makes grants to enable voluntary, community and social enterprises in Cumbria become more sustainable. **7 grants, £305,265**

Holehird Trust makes grants to community based organisations supporting residents of the former county of Westmorland. **27 grants, £40,980**

Joyce Wilkinson Trust supports community groups in the former county of Cumberland, prioritising the parishes of Rosley and Westward. **18 grants, £47,347**

Measuring Grant Impact



As well as showing how grant monies are spent, we ask funded organisations to report on the impact of their project. The data paints a picture of the demonstrated difference grant awards make to local people and communities on behalf of a range of fundholders.

The information is based on completed end of grant reports and covers six key themes, which are measured by

a set of outcomes and indicators. The impact measurement tool enables the Foundation to capture and demonstrate the value of a broad range of awards given out.

The impact review will also help to inform us of our impact challenges for the following year through a range of good practice and approaches.

Above: Cumbria Wheelchair Sports Club

Financial Summary

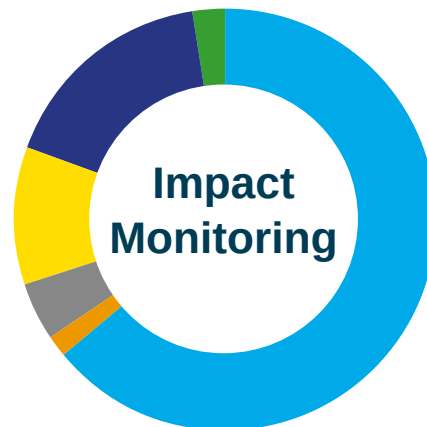
Cumbria Community Foundation Year ended 31 March 2017

This information is drawn from the draft accounts of the Foundation for year ended 31 March 2017. The final accounts, audited by Armstrong Watson, will be available from our website.

Incoming resources		£
Donations and legacies		4,482,933
Grant programmes		1,619,053
Investment income		377,433
Events		35,635
Total income		6,515,054

Resources expended		£
Charitable activities		7,222,045
Fundraising and publicity		64,483
Events		24,769
Investment costs		58,052
Total expenditure		7,369,349

Deficit for the year (excluding movement of investments) composed of		£
Donated to invest for future grant making		3,403,114
Revenue grants programmes		(4,257,621)
Surplus on unrestricted reserves		212
Surplus for year		(854,295)



- Advance people's physical and mental health, wellbeing and safety - **£4,284,147**
- Maximise ability to strengthen community cohesion and build social capacity - **£719,612**
- Connect people with the arts, culture and heritage - **£115,317**
- Promote reduction of isolation and disadvantage and access to local services - **£1,121,631**
- Improve life skills, education, employability and enterprise - **£297,319**
- Transform access to, and engagement with, the environment and public space - **£167,425**

Net assets at 31 March 2017		£
Funds invested for future grant making		15,506,430
Current grants programmes		3,295,968
Core unrestricted funds		349,543
Total assets		£19,151,941

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

TRUSTEES

Chair

David Beeby

Vice-Chair

Tim Cartmell

Honorary Treasurer

Valerie Young

Company Secretary

Tim Cartmell

Ian Brown DL FCA

Anthony Burbridge

Robin Burgess OBE DL *(resigned 17/11/16)*

Ian Burke *(resigned 26/09/16)*

Mike Casson

Steve Cockayne

Katherine Fairclough

Cath Giel

Jane Humphries

Tony Keen

Tim Knowles *(resigned 11/07/17)*

Adam Naylor MBE DL

Emma Porter

Richard Roberts

Willie Slavin

Sarah Snyder *(resigned 08/12/17)*

Mike Starkie

Caroline Thomson

Chris Tomlinson OBE

John Whittle

Diane Wood *(resigned 17/02/17)*

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

Gary Higgs

Programme Manager

David Allford

Development Assistant

Anne Meeghan

Administrator

Kristine McGlothlin

Communications Support Officer

Rachel Wilson

FLOOD TEAM

Flood Fund Manager

Jenny Benson

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

Saj Ghafoor

Ruth Guthrie

Jim Johnson

Cllr Matthew Severn

Chris Tomlinson OBE

Nick Utting

John Whittle

WEST CUMBRIA PANEL

Willie Slavin *(Chair)*

Cath Giel *(Vice Chair)*

Sandy Brown

Cllr Joan Ellis

Cllr Konrad Hansen

Valerie Hallard

Roger Hart

Cllr Keith Hitchen

Peter Johnstone

Cllr John Kane

Paul Rowe

Chris Shaw

COMBINED BARROW COMMUNITY TRUST AND GRANTS COMMITTEE

Tony Keen *(Chair)*

Tony Burbridge *(Vice Chair)*

Andrew Bass

Margaret Burrow

John Calvert

Jodie Cartwright

Pauline Charnley

John Dennis

Derek Lyon

Jayne Moorby



Happy Hooves Riding for All

Horses are becoming better known as therapeutic animals, helping people with a variety of physical and emotional issues.

Happy Hooves Riding for All, near Penrith, specialises in horse riding and interaction activities specifically for people with disabilities, long term health problems or mental health issues, children with behavioural issues, and families in crisis.

The centre receives referrals from charitable organisations such as Carlisle Mencap, children's hospice, Jigsaw, the Calvert Trust, day care centres and Cumbria County Council. Earlier this year, a £2,000 grant from the Edmond Castle Educational Trust provided subsidised riding lessons for people with disabilities.

One support worker said: "The sessions have made a huge difference to our clients by improving their social skills, increasing confidence and independence, as well as helping them to build muscle and improve co-ordination. It has given them a sense of freedom and something to look forward to each week. Previously, one client would not socialise and join in activities but now they are so enthusiastic and enjoy sharing what they have been doing with our other clients."



CUMBRIA

COMMUNITY FOUNDATION

We are one of 46 community foundations across the UK, and over 1,700 similar foundations around the world. We work with fundholders to provide a permanent, flexible and growing source of local charitable funding that will directly address the needs of Cumbria's most vulnerable.

Cumbria Community Foundation,
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Web: www.cumbriafoundation.org

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12 year old Ben Jasper working on a live action puppet film, as part of the 'Not Without Me' project run by Signal Film and Media in Barrow, and supported by the Fryer Grassroots Fund.



BREWIN DOLPHIN

As one of the largest independently-owned private client investment managers in the UK, with 29 offices and a local branch in Penrith, Brewin Dolphin is delighted to support Cumbria Community Foundation.

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FOUNDATIONS**
GIVING FOR LOCAL GOOD