



CUMBRIA
COMMUNITY FOUNDATION

ANNUAL REVIEW 2018
MAKING AN IMPACT



Introduction

Cumbria Community Foundation exists to address disadvantage by making life-changing grants and promoting philanthropy. We are one of Cumbria's foremost grant makers with grant distribution of over £4m in 2017/18 and long term funds in excess of £17m.

We provide philanthropic services to individuals, families and organisations and manage 90 grant making funds, supporting more than 500 community projects per year on behalf of our fundholders. Since 1999, we have invested more than £41m 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



The greatest pleasure I get from my time as Chairman is meeting the remarkable people from the groups who receive our grants and the individuals who benefit.

I have visited several funded projects over the year. I spent a day in West Cumbria at both Home to Work and South Workington Youth Partnership where I met people returning to work after recovering from illness and young people with disabilities who had achieved their Gold Duke of Edinburgh award.

This year's Annual Review is full of inspirational stories of positive change and generosity. It also features our new Impact Report. I encourage you to visit our website and read the report, you can also search and read more than 170 grant stories. In simple terms we demonstrate that philanthropy works.

Last year's Cumbria Revealed report set out the challenges facing the county and the need to promote philanthropy. We set ambitious targets to double our endowment and grant making in 5 years and I'm happy to say we're on track with both. We have new commitments to our long-term funds in excess of £3.5 million and a number of new funds under management including the United Utilities Legacy Fund in West Cumbria.

We will continue to significantly increase grant making funds at the Foundation

to enable us to support the causes that matter in our county.

I'd like to thank and recognise the trustees of the Beverley Trust, the Westmorland Family and Cumbria NHS Partnership Trust for their commitment to develop major new philanthropic programmes with us.

Once again, Cumbria was hit by extreme weather: in September 2017 in Millom and on the east fellside in March 2018. In both instances we moved quickly to help. Our most successful ever Winter Warmth Appeal could never have been more welcome with temperatures dropping below freezing day after day.

Finally, a huge thank you to our supporters and to all the amazing volunteers across the county. None of what you read would be possible without them.


David Beeby – Chairman

Measuring our Impact



The funding we give to local communities ranges from supporting very small groups such as lunch clubs for the elderly to food banks, training for young people to get them into employment and support groups for people with mental health needs.

The impact, or positive difference, made by our grants is significant. People's lives are changed by the work of groups supported by our fundholders. We published our first Impact Report during

the summer of 2018, sharing insights into the value and difference that donations and grants make to our communities. Linking to our grant priorities, as identified in our Cumbria Revealed report published last year, the report is based on completed end of grant reports.

The report was created using the new Impact Assessment Tool developed by UK Community Foundations. It brings together our grant monitoring information in a coherent and standardised way. The themes, outcomes and indicators groups

can choose from enable us to capture the kinds of changes community groups and local charities are achieving. Visit our website to read the full report: www.cumbriafoundation.org.

Monitoring grant awards increases our understanding of the projects we support and helps improve our decision making. It also provides information for discussions with groups about their current and future activities.

Despite the great work we fund, there clearly remains a huge amount of unmet need in the county. It is vital that we work with more Cumbrian individuals and businesses to build new philanthropic funds.

Research shows the vital role regular exercise plays in preventing, managing and rehabilitating conditions like heart disease, strokes, type 2 diabetes, blood pressure, arthritis and obesity, as well as problems such as depression or stress.

Fit 4 Life, a not-for-profit social enterprise based in West Cumbria, has been providing open sessions and classes for people aged over 50 along with specialist classes addressing certain conditions since 2006.

Ditching Diabetes, a project funded by the Abbeyfield Carlisle Society Over 55 Community First Fund worked with 20 people diagnosed with pre-diabetes over a six-month period. Each person received a personalised exercise programme with assessments and 6 months' free gym entry.

Dougie Pomfret, Manager, said: "Out of the 20 participants, all reduced their blood sugar, some significantly and all improved their fitness. At the final assessment, everyone reported being motivated to continue with their new healthy lifestyles into the future and over half continued their gym membership.

"One gentleman who took part in the project also suffered from anxiety and led a very sedentary lifestyle. He subsequently became a volunteer dog walker and went from doing no exercise to walking around an hour a day, five days per week. He has seen improvements to his blood sugar, weight and fitness and now says he feel great."



4,621 people attended training with **741** gaining accreditation



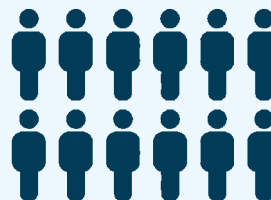
1,772 older people regularly attending social activities

3,802 youngsters accessed support services



671 groups providing health related activities

119,348 people supported through our grant making



1,019 people regularly volunteering

Growing Well

Around 34,000 Cumbrians experience depression and it's estimated there are more than 70,000 people in the county living with a common mental health disorder.

Growing Well, an organic farm-based mental health charity near Kendal, provides a safe supportive working environment to help people recover. It works with individuals on a weekly basis, sometimes over years, to help rebuild a sense of purpose, engage in meaningful and fulfilling activity and build hope for the future.

Participants are supported in their recovery by taking part in activities such as cultivating and picking crops, preparing meals and working in the office. There are also opportunities to study for horticultural qualifications. £15,000 from the Cumbria Fund and Holehird Trust will cover the cost of ongoing equipment and materials for the next three years.

Paul from Barrow has autism and suffers from anxiety. He previously worked as a carer but had to leave work owing to personal issues and the stress of working with difficult patients, many having come



Paul was referred to Growing Well by his GP

from prison. He was referred to Growing Well by his GP.

He said: "I thought it sounded OK and I liked gardening. The autism diagnosis helped explain a few things – I don't have any empathy or get emotional."

At first, he was quiet and shy, but soon started to feel better about himself. Paul joined the return to work group which helped to build his confidence and made him feel comfortable talking about his autism. He applied for a carer's role in a nursing home in Ulverston, and with help preparing for the interview, got the job.

Paul said: "I've been there six weeks

now, working 23 hours a week. I told them about my autism and they were very supportive. I still plan to come back to Growing Well when I'm not working – it's nice to see the people I work with as I've made friends."



125
people
improved
their mental
wellbeing

Citizens Advice Copeland

Citizens Advice Copeland has been supporting communities in West Cumbria for almost 20 years, providing a free, universal advice service.

Typically, the problems for which people seek advice are debt, welfare and housing as well as employment, consumer and legal issues. Clients tend to be vulnerable, and demand for advice services has increased in times of austerity and public spending cuts.

A grant of £9,813 from the Older People's Fund supported an outreach worker to provide specialist support to older, rurally isolated people in their own homes. As a result, 136 people were supported and more than £160,000 was secured in previously unclaimed benefits.

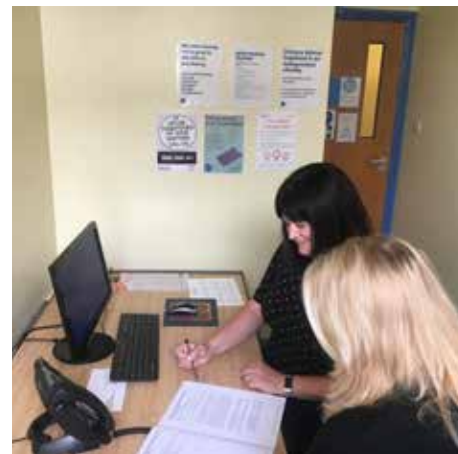
Mary and her husband William, both in their 80's, have been struggling with ill health over the last few years. Mary had been diagnosed with dementia and after a fall struggled walking any distance. William had been in and out of hospital owing to heart problems. During a home visit by Citizens Advice, they discussed their current situation and the support available and completed a benefit check

as neither of them had claimed before. They were able to claim Attendance Allowance, securing an extra £114 per week which they could use to pay for extra help around the home.

Shelley Hewitson, CEO Copeland Citizens Advice, said: "People turn up in times of absolute crisis. We'd like people to come and ask for help when they first feel that they are struggling to pay their bills. Our clients are not just on benefits, we help working people too."

Retired teacher, Irene, from Whitehaven has Parkinson's disease. She was forced to take early retirement because a history of poor mental health led to many extended stays in a psychiatric hospital with psychotic episodes. Her husband left her with several thousands of pounds worth of debt. She said: "The Citizens Advice have helped me so much. They put me at ease, sorted out my finances and helped me find a way to deal with my debts. They've taken a lot of stress away from me and my family. I'm not very employable. I will never pay the debts off in my lifetime, I can only manage them."

Shelley continued: "We know that there are people in their 80s or 90s dying with



debt - they are paying back two or three times what they borrowed. We can help people stop and plan, get on the right path and make better decisions."



136
older people
were given
advice and
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Cumbria Alcohol and Drug Advisory Service

An organisation at the forefront of tackling drug and alcohol addiction across the county is Cumbria Alcohol and Drug Advisory Service (CADAS). This is a county-wide issue but particularly serious in Barrow, which has seen nationally recognised numbers of deaths related to drug abuse.

Alcohol-related hospital admissions in Cumbria are worse than the average for England. CADAS aims to address and reduce the negative impact of problematic drug and alcohol use on individuals, their families and communities. It uses volunteers to deliver recovery and reintegration services and received £24,000 from the United Utilities Legacy Fund to employ a Volunteer Coordinator.

Carrie Bertram, CADAS Centre Coordinator, said: "Once trained, our volunteers can change a lot of lives. The intense eight-week training process gives volunteers the skills and understanding to help clients make positive changes in their lives. They see an average of two clients each a week, offering mediation, nutrition and lifestyle support and a signposting service."

Brian, 40, started drinking at the age of 14. He describes his addiction growing from alcohol to Ecstasy to cocaine before ending up in jail, where he started using heroin. "When I came out I was stealing from people, I was constantly asking for money. I was manipulating people. I didn't think I had a problem. I thought I didn't need recovery and that I could do it my way."

His journey to recovery is still a work in progress. He stopped using drugs and alcohol ten months ago and received help from The Well in Barrow and is on the 12-step programme. The Well connected him with CADAS where he explored a range of issues through counselling. He also received ten sessions of acustimulation (black box) therapy.

The combination of someone taking him in when he was at rock bottom, someone believing in him and finding The Well, his own hard work and his submission to the 12 steps and his complete trust and engagement with CADAS, has brought him this far.

Phil Caine, volunteer, said: "Volunteering is part of my own recovery. I live the 12-step programme. I wanted to work



with CADAS and with prevention, to use my knowledge of addiction and drugs. There is the behavioural side of addiction, that's a lot of what we do here, helping people figure out what is underneath the addiction, what is the set of behaviours and how to help change it."



125 people supported through their addictions

Support for Farming Communities

The herdyfund is a new fund for Cumbria Community Foundation but has been in existence since day one of Lake District brand, Herdy. The herdyfund's aim is to bring people together to create innovative and ambitious solutions to the problems facing farmers and rural communities.

Until this year it had been directly funded from a percentage of profits from Herdy but now that the fund is managed by the Foundation, it can also accept charitable donations.

Spencer Hannah, Herdy co-founder said, "We set up the herdyfund as we recognise that while our region's countryside and heritage is admired worldwide, fell farmers and rural communities who manage and maintain our cultural landscape can sometimes be 'unseen'."

Following devastation caused by Storm Emma and the Beast from the East in March, the first thing the herdyfund did to help was kick off an emergency relief fund with a £10,000 donation to provide vital aid to farms and rural communities. Cumbria Community Foundation provided match funding. The fund was also generously

supported by Carr's Group and a number of individual donors.

Farms and communities in and around Alston Moor, Bewcastle and the East Fellside suffered catastrophic losses. Sheep were buried in snow drifts, milk went uncollected and field boundaries were damaged. Farmers also faced additional costs including carcass collection and uninsured losses of livestock.

One East Fellside farmer struggled to get feed out to his sheep due to snow blocking roads and had no electricity for several days. The cattle shed was damaged with cows buried under snow within the building. He also lost 60 in-lamb breeding ewes.

Administered by the Farmer Network, the purpose of the Storm Emma Relief Fund was not to compensate for losses directly but rather to address household hardship that occurred as a direct result of the extreme weather.

The fund received more than 80 applications and awarded just over £30,000. Adam Day from the Farmer Network said: "The farmers appreciated the help from the fund but perhaps the most special thing about it to them was to know that other people actually cared".



Spencer Hannah continues, "It was important to help while farmers were facing a difficult time, it's a natural part of what the herdyfund can do. In addition, we're working on ideas for this year and beyond where we can come together to interact, share, help inspire and support Cumbrian rural farming communities in innovative ways.

"We're proud of what has been achieved since the beginning but even more hopeful about what lies ahead. In particular, we are delighted to be working with Cumbria Community Foundation. We are confident it will enable the herdyfund to reach its true potential."

Giving Back to the Community – United Utilities

A significant legacy fund has been created by United Utilities, aimed at providing financial support for local people and groups affected by or based within the area of the West Cumbria Water Supplies Project.

John Hilton, United Utilities West Cumbria project director, said: “We are carrying out a crucial infrastructure project across one of the most environmentally sensitive parts of the UK and we knew from the outset that we wanted to give something back to the communities that would be affected by up to five years of disruption.

“This fund will help leave a lasting legacy after our work has finished, helping improve the lives of people in West Cumbria.”

The United Utilities Legacy Fund is open to applications from community groups that benefit people in the Allerdale and Copeland areas. The fund awards grants of up to £30,000 and supports projects that help organisations become more sustainable or those that have a lasting community-wide benefit. Funding is available until 2020.

Lake District Mobility provides specialist ‘all terrain’ vehicles, known as trampers.



Pat Newlove can now enjoy the Lake District views
Credit: Tom Kay, Cumbrian Newspapers

They are available for hire for people with limited mobility to participate in outdoor activities with their family and friends. A grant of £15,000 contributed towards staff costs. This project is giving people who are potentially isolated and lonely access to the countryside and also means that people who can normally walk short distances can go a little further.

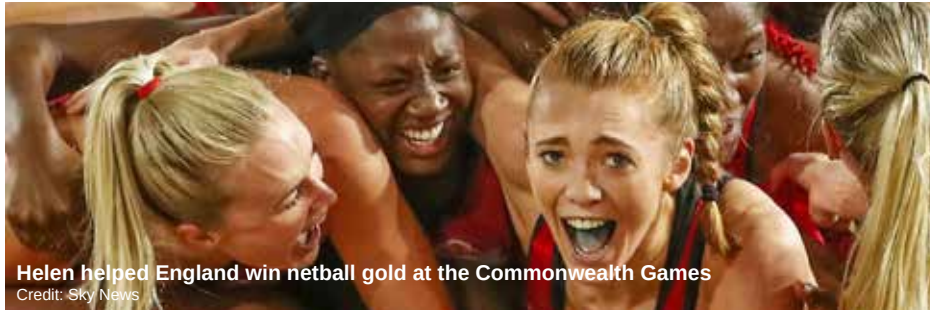
Pat Newlove, 70, of Cockermouth, was the first person to sign up to the scheme. She said: “This has opened up places I never thought I’d be able to enjoy again. Now I can be part of a group and get out.

The trampler is very easy to use and very stable.”

Setting up a fund at the Foundation is a simple alternative to a company managing its own community giving. It offers flexibility, takes away the administrative burden and benefits from the Foundation’s unrivalled knowledge. If you are interested in supporting the community in this way, please contact us.

Trust in the Foundation

There are thousands of charitable trusts across the UK that are either dormant, inactive, or ineffective. Many have ceased to operate for a variety of reasons, often through circumstances that are beyond the control of the original trustees.



Helen helped England win netball gold at the Commonwealth Games
Credit: Sky News

We provide a range of solutions for the trustees of charitable trusts. These include assisting with grant making, taking over a trust completely or offering a level of involvement to the trustees without the burden of financial and legal responsibilities.

The Beverley Trust was set up in 1969 by a West Cumbrian who gave generously throughout her life, including supporting local schoolchildren. When she died, two members of her family became trustees and over the last two years worked with the Foundation to identify suitable

applicants. The trust, worth £1 million, was recently transferred to the Foundation and the former trustees continue to be involved in grant making decisions.

The Cumberland Educational Foundation, formerly the Cockermouth Grammar School Trust, worth just under £500,000 at the time, was transferred to the Foundation from Cumbria County Council in 2003. The fund was invested and is now worth just under £1 million. It has awarded grants of almost £300,000 to young people, charities and community groups in the former county of Cumberland,

assisting with further academic study, the development of practical skills or sporting and artistic excellence.

Helen Housby, 23 from Drumleaning, near Wigton received three grants from the Cumberland Educational Foundation totalling £4,000 to help with netball training and competition costs as she was travelling 700 miles a week to Manchester to ensure she was at the top of her game.

A last-second goal by Helen helped England win gold at the Commonwealth Games in April this year. It is the best result in England's history, having previously won silver at the 1975 World Cup. Helen said: "For netball in England, all the little girls at home, I want them to be inspired by this. I certainly didn't have this kind of success to look up to when I was growing up."

If you are aware of a charitable trust you think is maybe dormant, inactive or where trustees are finding it difficult to source good applications, we may be able to help. Contact Anne Meeghan, Development Assistant, to discuss further.

Fighting Fuel Poverty

In a bad winter 300 people in our county lose their lives to the effects of the cold. In our worst winters, this figure has risen to more than 500.

Fuel poverty is one of the hidden issues of our rural county which greatly affects the health and wellbeing of those who cannot heat their homes. Across Cumbria, more than 28,000 households, or 1 in 10, are living in fuel poverty and have to make the harsh choice between eating and heating.

Most people who suffer premature winter-related death are aged over 65, and 75% of these deaths are due to the impact that cold has on respiratory and circulatory conditions. Cold housing exacerbates conditions such as arthritis and rheumatism, chronic lung disease and asthma.

The Winter Warmth Appeal was launched eight years ago and since then has awarded almost £600,000 in grants to people aged 60 and over. The money, generously donated by hundreds of people each year, can pay for fuel bills, warm clothes and blankets, transport to doctors' appointments or a



cupboard full of food. We partner with Age UK to reach as many of the most vulnerable people in our county as we can. They also provide advice on switching energy suppliers and how to claim appropriate benefits and discounts. To find out more about the Winter Warmth Appeal or to donate visit: www.cumbriafoundation.org/winter-warmth-fund

Each winter, more than a hundred people sleep out under the stars by taking part in the Big Sleep to raise money for the Winter Warmth Appeal. Hosted in the grounds of the Low Wood Bay by English Lakes Hotels, the event encourages people to get sponsorship for sleeping out, when temperatures have dropped to minus 6 degrees.



If you'd like to take part in the next Big Sleep on Saturday 9th March 2019, you can sign up via www.cumbriafoundation.org/bigsleep

Boosting Youth Social Action



Currently just under half of all young people aged between 10 and 20 get involved in activities that make a positive difference in their communities. The #iwill Fund aims to increase volunteering among young people.

Working with UK Community Foundations and delivered locally by Cumbria Community Foundation, the Big Lottery Fund and the Department for Culture, Media & Sport contributed £40,000 per year for two years which was match

funded by charitable trusts and local companies including Thomas Graham, Shepley Engineers, Sellafield and Lakeland, generating a fund worth £80,000 per year.

1 in 10 children and young people experience mental health issues - that's three pupils in the average school classroom. Teenagers from the Ewanrigg estate in Maryport are tackling this issue by campaigning for better mental health support for young people.

The 'We Will' project is led by young people aged 14-18, some with mental

health issues themselves and some concerned about their friends, who identified there was a lack of mental health resources available to them. The project received £5,000 and aims to train 250 people in Youth Mental Health First Aid. The group have been initiating conversations with their peers and have arranged workshops where they can bring people together including GPs, health commissioners and specialists to discuss the issues and opportunities.

Motivating young people as changemakers and encouraging them to become involved with and lead community projects fosters aspirations and builds confidence. In recognition of their work, they were invited to present to 450 community leaders at the Big Local conference in London about the impact they have made in their community.

Jasmine, 17, said: "What we believe will make the single biggest difference when tackling this mental health crisis is committing to listening better to those around us. By listening better, we are improving the network of support available and showing young people that they don't have to be alone in difficult times."

Corporate Membership

Around 125 businesses in Cumbria support their local communities through membership of the Foundation. The variety in size, business sector and location in the county of businesses who are corporate or challenge members of the Foundation and can be seen on pages 17-19.

Foundation members are entitled to vote at our Annual General Meeting, which is combined with our Annual Celebration and Dinner, this year taking place on Thursday 8 November 2018. Corporate members are listed both in our Annual Review and on our website. Some businesses have chosen to be Challenge members, demonstrating an additional commitment to the Foundation. They receive a small discount on taking a table at the Annual Celebration

and Dinner and are invited to an exclusive event during the year.

We keep in touch with members both through our regular and members-only newsletters and promote new members and their activities on our social media channels.

For many businesses, membership is just a start, with many of them going on to organise fundraising activities for our general grant making, sponsor events we hold, participate in the Big Sleep to raise money for our Winter Warmth Appeal and set up their own funds at the Foundation.

Contact Anne Meeghan, Development Assistant, if you would like to discuss membership and/or setting up and building a corporate fund and the professional philanthropy services the Foundation offers.

Keswick Alhambra Cinema has been a corporate member



of the Foundation since 2013, shortly after Tom Rennie took over the business. Tom told us that he wanted to do more for the Foundation than being a corporate member. Last year, he with his daughter, Carol, and her husband, Alan, put on an additional matinée screening of the Royal Ballet's Nutcracker on Christmas Eve, to raise money for our Winter Warmth Fund. 172 people

attended the screening and enjoyed mince pies, stollen and elderflower cordial in the interval, with over £800 raised for the Winter Warmth Fund to ensure older Cumbrians do not have to choose between heating and eating over the cold winter months.

Corporate Members Carol and Tom Rennie from Keswick Alhambra Cinema. Photo courtesy of the Cumberland News)

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: 32152967 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
Organisation
Address
Role
Tel No
Email
Signed
Date

Where possible, we will communicate with you by email. We would also like to send you additional information about our activities and fundraising opportunities. You can unsubscribe from those e-communications at any time.

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.

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



Nevil Jeffery, General Manager at Low Wood Bay Hotel, receiving the fabulous baked goods from Emily Sudell, Marketing Executive at Bells of Lazonby

Challenge Member and family run business, Bells of Lazonby, donated a selection of over 600 delicious gluten-, wheat- and milk-free cakes and 200 freshly baked stotties for the participants in the Big Sleep event in aid of the Winter Warmth Appeal.

Michael Bell, MD and second generation family business owner of Bells of Lazonby, said: "We are humbled by the Big Sleep event and greatly admire the work Cumbria Community Foundation do – we love our place, Cumbria and try to do everything we can to support it. It was an honour to donate our cakes and breads to such a worthy cause."

Corporate Members

Architects Plus (UK) Limited

Baines Wilson LLP

Birchwood Farms Ltd

Brewin Dolphin Limited

Britain's Energy Coast Business Cluster

Burn How Garden House Hotel

Burnetts Solicitors

Capula Ltd

Carlisle Diocese

Carlisle Refrigeration Ltd

Carr's Flour Mills Limited

Carter Jonas LLP

Castle Green Hotel

CGP Publications

CN Group Ltd

Cowens Ltd

Cranstons Quality Butchers Limited

Cumberland & Westmorland Herald

Cumberland Building Society

Cumberland Pencil Company

Cumbria Chamber of Commerce

Cumbria Waste Management Ltd

David Allen

Day Cummins Architects

Designworks (Cumbria) Limited

Direct Rail Services Limited (DRS)

Dodd & Co

Doosan Power Systems

Eden Housing Association

English Lakes Hotels Limited

Fastness Data Services Limited

Furness Newspapers Limited (BCT)

Firpress Group Limited

Florence Madden Associates

Fulcrum Films Limited

Grasmere Gingerbread Shop

H & H Group plc

Hackney & Leigh

Hertel (UK) Limited

H F T Gough & Co

Holmegate Farms Limited

Houghton-Parkhouse Limited

Ibis Hotel Carlisle

Iggesund Paperboard (Workington) Limited

Innovia Films Limited

Jacobs Stobbarts Limited

Jacobs UK Limited

James Cropper plc

James Walker & Co Limited

Jardine Finan Limited

J Edgar & Son

J L Winder & Co (BCT)

Keswick Reach Lodge Retreat

Keswick Alhambra Cinema

KPMG LLP

L & W Wilson (Endmoor) Limited

Lamont Pridmore

Lindeth Howe Country House Hotel

Low Sizergh Barn

McVities

Meldrum Limited

Mitchells Auction Company Limited

Napthens LLP

New Balance Athletic Shoes (UK) Limited

NFU Mutual (Carlisle)

Northern Security Limited

Nuclear Decommissioning Authority (NDA)

Nuvia Ltd

Oil States Industries (UK) Ltd Barrow
Division (BCT)

Park, Gate & Company Limited

Penrith Building Society

PFD (Carlisle) Limited

Pirelli Tyres Limited

Prima Uno

Progression Solicitors Limited

Rathbones

Ravenglass and Eskdale Railway
Co Limited

Rayrigg Estates Limited

R G Parkins & Partners Limited

Risedale at Abbey Meadow (BCT)

Robert Meacock & Company

Russell Armer Limited

Saker Solutions Limited

Salvana's Ristorante (BCT)

Sanlam Private Wealth

Sarah Nelson's Original Celebrated

Savills (UK) Limited

Shepley Engineers Limited

Smurfit Kappa Composites

Spedding Dental Clinic

The Leathes Head Hotel & Restaurant

Thomson Hayton Winkley

Ullswater Navigation and Transit Co Limited

Ultra Electronics Limited

University of Cumbria

Warwick Square Osteopaths Limited

Westlakes Engineering Limited

Womble Bond Dickinson LLP

(BCT) denotes Barrow Community Trust



Cranston's Quality Butchers supported the Winter Warmth Appeal by donating a percentage of every Steak and Eden Best Ale pie sold between January and February. Left to right is CCF CEO, Andy Beeforth with Phillip Cranston, Managing Director of Cranstons.

Grant Making 2017-18

Full details of the funds, including their grant making criteria, are available on our website.

#iwill Fund

19 grants, £86,957

Abbeyfield Carlisle Over 55 Fund

11 grants, £33,056

Abbeyfield Society Community First Fund

10 grants, £24,255

Alston Moor Community Fund

1 grant, £1,000

Barrow Community Trust

9 grants, £10,165

Barrow in Furness Endowment Grassroots Fund

3 grants, £2,430

Beck Burn Wind Farm Community Fund

31 grants, £142,175

Brian & Ann Clark Fund

9 grants, £8,757

Broughton Moor Windfarm Fund

3 grants, £13,560

Carr's Group Fund

1 grant, £1,600

Castle Green Grassroots Fund

4 grants, £2,965

CN Fund

4 grants, £3,888

Comic Relief

3 grants, £7,556

Crofton Trust Fund

2 grants, £1,760

Cumberland and Westmorland Herald Fund

2 grants, £1,074

Cumbria County Council Placed Based Services

11 grants, £725,891

Cumberland Educational Foundation

23 grants, £62,872

Cumbria Cultural Fund

5 grants, £2,650

Cumbria Disaster Fund

112 grants, £63,425

Cumbria Grassroots Fund

7 grants, £6,452

Cumbria Flood Recovery Fund 2015 (Groups)

69 grants, £663,511

Cumbria Flood Recovery Fund 2015 (Individuals)

476 grants, £970,962

Cumbria Fund

The following funds contributed income to this fund:

Gregg Fund
Hensman Acorn Fund
James Cropper Fund
Laing Fund
Middlebrook Foundation Fund
Napthens Fund
Northern Rock Foundation
Out of Eden Fund
Viscount Whitelaw Fund
49 grants, £210,272

Cumbria Housing Partners Fund

10 grants, £71,235

Cumbria Industries Amenities Fund

3 grants, £3,100

Cumbria Victims Charitable Trust Fund

9 grants, £5,655

Cumbria Young People's Fund

15 grants, £41,691

Doosan Babcock Grassroots Fund

1 grant, £643

Dora Beeforth Memorial Fund

10 grants, £4,549

Dowker Bindloss Charity

2 grants, £1,000

Edmond Castle Educational Trust

17 grants, £17,085

Elizabeth Fell Memorial Trust

2 grants, £2,117

English Lakes Hotel Trust Fund

2 grants, £2,549

Evening Hill Grassroots Fund

2 grants, £1,500

Fairfield Community Fund

3 grants, £11,127

Fryer Grassroots Fund

7 grants, £8,412

Gibb Charitable Trust Fund

1 grant, £1,428

Grassroots Cumbria Young Peoples Fund

9 grants, £24,421

Gurney Charitable Trust Fund

4 grants, £5,182

Hackney & Leigh

1 grant, £300

Hellrigg Windfarm Community Fund

9 grants, £25,800

High Pow Community Fund

1 grant, £5,000

High Sheriff's Crimebeat Fund

3 grants, £5,774

HSBC Fund

1 grant, £1,727

Hunter Davies Fund

2 grants, £5,500

Janetta Topsy Laidlaw Fund

1 grant, £2,000

Johnson Fund

7 grants, £5,300

Kipling Fund for older people

2 grants, £1,500

Kipling Fund for younger people

4 grants, £2,600

Kirkby Moor Wind Farm Community Benefit Fund

3 grants, £3,703

Lamont Pridmore Grassroots Fund

4 grants, £5,450

Lawrence Fund

4 grants, £1,926

Liddle Thompson

2 grants, £1,550

Live the Dream Fund

24 grants, £32,991

Lord Egremont Fund for West Cumbria

2 grants, £10,000

Mars GoodnessKNOWS

2 grants, £10,000

Mary Grave Trust

60 grants, £48,933

Moorhouse Grassroots Fund

2 grants, £10,000

Nuvia Fund

2 grants, £3,000

Older People's Fund (Cumbria)

10 grants, £85,310

Quarry Hill Grassroots Fund

7 grants, £15,000

Robin Rigg West Cumbria Fund

8 grants, £65,000

Roselands Trust Fund

10 grants, £9,252

Rowan Community First Fund

1 grant, £1,000

Russell Armer

5 grants, £5,000

Shepley Group Fund

7 grants, £8,454

Solway Fund

7 grants, £15,500

Stobbarts Ltd Grassroots Fund

2 grants, £1,124

Storm Emma Relief Fund

1 grant, £20,000

Strummer Calling Community**First Fund**

3 grants, £3,000

Swales Trust Fund

19 grants, £6,323

Tallentire Windfarm Fund

7 grants, £31,572

The Border Fund

1 grant, £2,962

The Dulverton Trust

26 grants, £108,500

Thomas Graham Grassroots Fund

9 grants, £12,099

Ullswater Trust Grassroots Fund

11 grants, £19,375

United Utilities Legacy Fund

9 grants, £70,608

Violet Laidlaw Trust Fund

3 grants, £3,629

Westmorland Arts Trust

9 grants, £12,000

Westmorland Family Fund

11 grants, £61,625

William Milburn Trust Fund

4 grants, £3,724

**Wing Cdr H Thompson & Rev Green
Grassroots Fund**

1 grant, £3,800

**Winscales Moor Community
Benefit Fund**

2 grants, £2,070

Winter Warmth Fund

3 grants, £132,430
Supporting 1,075 people

**Workington (Ashfield) Lawn Tennis
Club Fund**

1 grant, £2,510

TOTAL **1,274** **£4,133,848**

Funds administered by CCF

Cumberland Building Society Charitable Foundation
49 grants, £25,250

Fresh Ideas Fund
4 grants, £150,000

Holehird Trust
25 grants, £39,999

Joyce Wilkinson Trust
20 grants, £70,443

TOTAL **98** **£285,692**



14 local businesses supported the Hug a Mug project, providing labour and materials to renovate a room. Volunteers offer a cuppa and a confidential chat with signposting to other support services.

Cumbria Exchange

Cumbria Exchange is a new online portal, connecting local businesses offering free and in-kind support to community organisations needing assistance.

The project was pioneered by United Utilities secondee to Business in the Community 'business connector' programme, Katie Harper. It now has the involvement of Copeland Community Fund, Cumbria Community Foundation, Nuclear Community Network and Britain's

Energy Coast.

The overwhelming response to the initiative suggests that it is providing a much-needed solution to a very real problem. Success stories so far include the launch of the 'Hug a Mug' mental health project at Maryport, a makeover for Young Cumbria's residential facility, Isthmus Cottage, media support for West Cumbria Carers and the refurbishment of Café West in Workington.

To find out more, visit:
www.cumbriaexchange.co.uk

Giving Back, Looking Forward

Cumbria Community Foundation will be marking its 20th anniversary in 2019. Thanks to our fundholders, we have made significant contributions to the lives of some of the county's most disadvantaged people, awarding more than £41 million in grants since 1999.

We are running a year-long campaign throughout 2019 to raise awareness of the community groups and individuals who have made a real difference over the past two decades.



We are also encouraging people and businesses to get involved in our anniversary celebrations by either hosting an event or taking part in a challenge to help raise money for our Cumbria Fund.

Please get in touch with Anne Meeghan, Development Assistant, to discuss ways on how you can be involved in supporting us.

Celebrating Philanthropy



This year we wanted to recognise and say thank you to our fundholders and donors by hosting two special events over the summer in Kendal and Carlisle. The events provided an opportunity to connect with other like-minded people and learn more about critical issues in our communities.

We'd like to say a special thank you to our hosts, Catherine and James Alexander (pictured) for the use of Castle Green Hotel, Giles and Penelope Mounsey-Heysham for providing their home as a venue, and to Rathbones for sponsoring the events.

Catherine Alexander said: "By channelling our giving through the Community Foundation, we are confident that our money is being used wisely and effectively. Our fund, to which we add every year, is specified to be used for the benefit of the people of Kendal. All our staff are involved in choosing which local causes benefit from our fund. It will be there to contribute to the wellbeing of the people of Kendal for many years to come, which gives us a good feeling."

Financial Summary

Cumbria Community Foundation Year ended 31 March 2018

This information is drawn from the draft accounts of the Foundation for year ended 31 March 2018. The final accounts, audited by Armstrong Watson, are available from our website.

Incoming resources	£
Donations and legacies	772,502
Grant programmes	2,105,568
Investment income	459,121
Events	22,410
Total income	3,359,601

Resources expended	£
Charitable activities	4,556,596
Fundraising and publicity	109,894
Events	22,849
Investment costs	74,321
Total expenditure	4,763,660

Deficit for the year (excluding movement of investments) composed of	£
Donated to invest for future grant making	430,127
Revenue grants programmes	(1,822,838)
Surplus on unrestricted reserves	(11,345)
Surplus for year	(1,404,056)



- Improving the lives of disadvantaged children and families - **£373,449**
- Strengthening and supporting fragile communities - **£1,675,090**
- Improving the life skills, education, employability and enterprise of disadvantaged people - **£452,306**
- Supporting vulnerable older people - **£983,596**
- Improving the health and well-being of the people of Cumbria - **£291,749**
- Enabling people to access arts, sports, culture, heritage and the environment - **£356,014**
- Other aims - **£1,644**

Net assets at 31 March 2018	£
Funds invested for future grant making	15,688,446
Current grants programmes	1,663,077
Core unrestricted funds	338,198
Total assets	£17,689,721

The Team



Blackwell Sailing received £3,459 from the Brian & Ann Clark Fund, Roselands Trust and the Holehird Trust to take adults with visual impairment sailing on Lake Windermere.

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 DL The Right Reverend James Newcome Lord Bishop of Carlisle Lord Inglewood DL Arthur Sanderson OBE DL

TRUSTEES

Chair

David Beeby

Vice-Chair & Company

Secretary

Tim Cartmell

Honorary Treasurer

Valerie Young

Ian Brown DL FCA *(retired 09/11/17)*

Anthony Burbridge

Mike Casson *(retired 09/11/17)*

Steve Cockayne

Nicholas Coulson

Katherine Fairclough

Cath Giel

Sue Howorth

Jane Humphries

Jim Johnson

Alison Johnston

Tony Keen

Tim Knowles *(resigned 09/07/17)*

Adam Naylor MBE DL

Emma Porter *(resigned 29/09/17)*

Richard Roberts

Willie Slavin

Mike Starkie

Caroline Thomson *(resigned 19/03/18)*

Chris Tomlinson OBE

John Whittle

STAFF

Chief Executive

Andy Beeforth OBE

Chief Operating Officer

Cath Howard

Finance Director

Andrew Benson

Finance Officer

Lynsey Madders

Philanthropy Officer

Jenny Benson

Development Assistant

Anne Meeghan

Senior Grants and Donor Services Officer

Ellen Clements

Grants & Donor Services Officer

Gary Higgs

Grants & Donor Services Officer

Joanne Spencer

Grants and Donor Services and Communications Officer

Annalee Holliday

Communications Support Officer

Rachel Wilson

Administrator

Kristine McGlothlin

GRANTS COMMITTEE

Chair

Jane Humphries

Vice Chair

Willie Slavin

Hokey Bennett-Jones

Tim Cartmell

Saj Ghafoor

Ruth Guthrie

Cllr Chris Hogg

Cllr Doug Huggon

Jim Johnson

Colonel (Ret'd) Chris

Sanderson OBE, JP

Chris Tomlinson OBE

Nick Utting MBE

Kevin Walsh

John Whittle

We would like to thank our team of more than 70 volunteers who gave many hours of their time at the various grant panels throughout the year. Their collective skills, knowledge and dedication are what make our work possible.

WEST CUMBRIA PANEL

Chair

Willie Slavin

Vice Chair

Cath Giel

Richard Atkinson

Sandy Brown

Cllr Joan Ellis

Valerie Hallard

Roger Hart

John Hilton

Richard Leafe

Ian McCoy

Cllr Ged McGrath

Cllr John Kane

Cllr Tony Lywood

Paul Rowe

Chris Shaw

COMBINED BARROW COMMUNITY TRUST AND GRANTS COMMITTEE

Chair

Tony Keen

Vice Chair

Tony Burbridge

Andrew Bass

Margaret Burrow

John Calvert

Jodie Cartwright

John Dennis

Jayne Moorby



"The project gives me a sense of job satisfaction." Calderwood House resident

Nurturing Communities

A new fund has been created by Lord Egremont to support his family's long-term involvement in the area and to help people improve their lives by getting them involved in their communities.

Lord Egremont grew up in Petworth in West Sussex but regularly visited his mother, Lady Egremont, who moved to the family estate in Cumbria, which includes Cockermouth Castle and the ruins of Egremont Castle, in the late 1970's.

Lord Egremont, said: "I have been lucky enough to have known West Cumbria, particularly the town of Egremont, for almost seventy years. I have great admiration and respect for its people and am very happy to be able to help the community in this way."

Calderwood House, a homeless hostel in Egremont received £5,000 for residents to work together with a trained horticulturist to grow vegetables, which are then used in the kitchen, on their newly acquired allotment site. The project offers a safe and healthy space to work as a team, giving residents a support network to deal with issues such as isolation, depression and low self-esteem, as well as getting them out in the fresh air while learning valuable skills.

A further £5,000 was given to Egremont Youth Partnership, which provides a range of activities throughout the week for young people, including young adults with learning disabilities.



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 people.

Cumbria Community Foundation,
Dovenby Hall, Dovenby, Cockermouth,
Cumbria CA13 0PN
Tel: 01900 825760
Email: enquiries@cumbriafoundation.org
Web: 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



Exploring old age, home and identity as part of Heron Corn Mill's year-long arts project, a Beautiful End, supported by the Westmorland Arts Trust.



**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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GIVING FOR LOCAL GOOD