



COMMUNITY FOUNDATION
IN WALES
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FLINTSHIRE COMMUNITY FUNDS
IMPACT REPORT OCTOBER 2018

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Front cover – Music in Hospitals and Care

COMMUNITY FOUNDATION IN WALES NEWS

It's been quite a year for us here at the Community Foundation in Wales, as we said goodbye and good luck to Misia Kuczys - Grants Administrator, Sarah Morris - Office Administrator and Mari-Wyn Elias-Jones - Development Manager as they moved on to pastures new.



Richard Williams our Chief Executive - who started in September 2017- took this opportunity to think about the overall staffing structure of the organisation. In

the early New Year, we welcomed Carol Doyle and Jessica Davies to the new roles of part-time Finance Assistant and full-time Grants Officer respectively. The role of Development Manager was split into 2 part-time roles to reflect the two very different elements of work – we appointed Katy Hales to the role of Manager, Donor Advised Giving in September 2018. The other post will focus on work with Trusts and Foundations, we hope to appoint to this post in late Autumn.

It was an initiation by fire for Richard as we hosted UKCF's Bi-annual conference in Cardiff in what was his second week at work. It was however a great chance for Richard to get a good understanding of the network, of our work and to build working relationships with some of the other Chief Executives across the UK. As a result of the conference and from speaking with others Richard quickly recognised the need for the Community Foundation in Wales to be more visible to our audience and our stakeholders, which has led to the creation of a new role within the organisation for a Communication and Marketing Officer – Anoushka Palmer, joined us in August and has rapidly settled into this new and exciting role.

New Programmes

With UKCF and the Community Foundation network, we have been working with the Home Office to distribute funds to promote cultural understanding and build more resilient communities as part of its Counter Extremism Strategy. Projects will focus on tackling prejudice and discrimination, build community vision and a sense of belonging, and increase levels of trust and cooperation between individuals.

Homelessness is becoming more and more evident especially in Cardiff, in partnership with Cardiff County Council and the Big Issue we launched a new fund in Cardiff called Give DIFFerently, to tackle the issue of rough sleeping by encouraging public donations via innovative contactless payment technology to a fund that will distribute small grant funding. A referral agency will apply for grants to support individuals to make and sustain changes to prevent homelessness and causes related to or leading to homelessness. The Fund will award grants for example, to purchase appropriate clothing for interviews and/or employment or to purchase furniture/household items for a rough sleeper who has moved into a tenancy.

We are working with Nationwide Building Society on a homelessness based project to support local housing projects in across Wales, to give even more people a place fit to call home. With these grants, we will fund projects that provide housing services to people in need and support the most vulnerable. For example it could fund disability aids for supported living to enable the elderly

to live independently at home for as long as they are able and willing to.

In partnership with Oak Foundation, we are managing a Transformation and Growth Fund. This fund is looking to support groups across areas of South Wales working in the homelessness sector to build capacity to improve governance and to strengthen

infrastructure helping them become more competitive in the everchanging and difficult funding environment we are currently facing.

FUND HISTORY & OVERVIEW

HISTORY

The Flintshire Community Endowment Fund was established in September 2013 following the decision by Flintshire County Council to transfer the assets obtained following the closure of a range of historic trust funds to a new 'umbrella' Fund at the Community Foundation in Wales. The Fund was officially launched in November 2013 at Airbus in Broughton. The value of the endowment on transfer was £178,975.

In March 2018, the Clwyd Welsh Church Act Fund was transferred to the Community Foundation in Wales. The value of the fund on transfer was £537,497. The Community Foundation in Wales was also instructed to undertake the grantmaking element for Flintshire, using the skills of the panel already set up for the Community Endowment Fund.

Although not a County Council transfer, in 2013 we were transferred the endowment for the Hawarden & District

relief in Need Fund, to the value of £255,594.

The grant making for the fund is managed internally by the grants team at the Community Foundation. As the name suggests, the Fund supports those in Hawarden and District who may be in crisis and/or vulnerable and are struggling with limited resources.

OVERVIEW

Flintshire Community Endowment Fund & Flintshire Welsh Church Art Fund grants are now awarded twice a year. The Fund has its own grants panel which is made up of six members, each with good knowledge and experience of the needs within Flintshire. The members are nominated by the Council and serve for a minimum period of three years. The current members are:

- Karen Armstrong, Flintshire Council Officer
- Trevor Jones, Flintshire Council Officer

- Aaron Shotton, Leader, Flintshire County Council
- Cllr. Christopher Bithell, Flintshire County Council
- Cllr. Clive Carver, Hawarden Community Council and Flintshire County Council
- Heather Hicks, Flintshire County Voluntary Council.

The Panel is chaired by a senior staff member of the Community Foundation in Wales. Panel recommendations are presented to the Foundation's board of trustees which reviews and ratifies grant decisions. The input and knowledge of panel members has been invaluable and ensured that all grant decisions are made locally, informed by knowledge of local needs and priorities.

All grants are awarded subject to strict terms & conditions and are monitored after twelve months to ensure compliance with the terms of the grant and to measure the impact of the grants on individuals and communities.

FINANCIAL PERFORMANCE

INVESTMENT PORTFOLIO

The total value of the Foundation's investment portfolio at 30 September 2018 is £15m.

In accordance with our investment strategy, which manages risk through a diversified portfolio split between three investment managers, the endowment is invested with Rathbones, M&G Investments, and CCLA.

The Performance of the investment managers is monitored on a regular basis by the Foundation's Finance Manager and scrutinised quarterly by the Finance, Risk & Investment Committee.

A full review of our Investment Managers is carried out every three years. The next review will take place early 2019.

The Foundation has also now adopted a total return policy for its investment

portfolio. Each year our trustees recommend the annual distribution pot available for grant-making. This approach enables us to be more responsive to the needs of communities and our fundholders. It also allows us to be more efficient with our endowment, ensuring that the assets spend as much time invested as possible. Over time we are confident that this will generate greater overall returns for our fundholders and therefore higher levels of grant-making for our beneficiaries.

INVESTMENT ENVIRONMENT

It remains a somewhat challenging investment environment with the underlying strength of the global economy providing a positive backdrop for global earnings, but balanced against the negative developments associated with Trump's trade war, rising interest rates, a stronger dollar and geopolitical issues, including Brexit.

Overall, while certain concerns will likely mean some volatility, the underlying global economy remains relatively robust with a recession looking unlikely at this stage. Valuations look reasonable and as investors we are still getting paid to take some risk which continues to look sensible, albeit on a cautious basis.

ASSET ALLOCATION & RETURNS

Our asset allocation is as follows:

UK equities:	48%
Overseas Equities:	30%
Fixed interest:	11%
Alternatives:	7%
Cash:	4%

Over the last 12 months (1 Oct 2017 to 30 Sep 2018) the total return across the portfolio has been 6.4%.

FUND STATEMENT

FLINTSHIRE COMMUNITY ENDOWMENT FUND

	Income & Expenditure	Endowment	Total
Income			
Initial capital endowed	-	178,975	178,975
Top-sliced income for grant-making	20,000	-	20,000
Investment income received (2013-2017)	35,124	-	35,124
Investment income (recommended distribution for f/y 2018/19)	7,133	-	-
Total income	62,257	178,975	241,232
Expenditure			
Grants (2013-)	38,807	-	38,807
Annual core cost contribution (2013 -)*	21,008	-	21,008
Total expenditure	59,815		59,815
Gains/(losses) on investments	-	36,092	36,092
	2,442	215,067	217,509

* Includes projected annual core cost contribution for f/y 2018/19

FUND STATEMENT

CLWYD WELSH CHURCH FUND

	Income & Expenditure	Endowment	Total
Income			
Initial capital endowed	-	537,497	537,497
Initial income received	-	12,549	12,549
Investment income (recommended distribution for f/y 2018/19)	20,000	(20,000)	-
Total income	20,000	530,046	550,046
Expenditure			
Grants (2018-)	3,539	-	3,539
Annual core cost contribution (2018 -)*	-	9,406	9,406
Total expenditure	3,539	9,406	12,945
Gains/(losses) on investments	-	44,364	44,364
	16,461	565,004	581,465

*Includes one off set-up core cost contribution

FUND STATEMENT SUMMARY

(INCLUDING HAWARDEN & DISTRICT RELIEF IN NEED FUND)

	Flintshire Community Endowment Fund		Clwyd Welsh Church Act Fund		Hawarden & District Relief in Need Fund		Total
Capital for investment as at 30 Sep 2018	£	215,067	£	565,004	£	331,816	£ 1,111,887
Recommended grants distribution pot for f/y 2018/19	£	5,682	£	20,000	£	43,657	£ 69,339
Grants made this f/y as at 30 Sep 2018	£	3,240	£	3,539	£	4,093	£ 10,872
Remaining recommended grants distribution pot as at 30 Sep 2018	£	2,442	£	16,461	£	39,564	£ 58,467
Total Fund value 30 Sep 2018	£	217,509	£	581,465	£	371,380	£ 1,170,354

SUMMARY OF GRANTS AWARDED

Flintshire Community Endowment Fund – March 2018

	Grant Applicant	Project Summary	Amount Awarded
Groups			
1	Cylch Meithrin Terrig	The Peeples programme structure is made up of 5 strands of learning and development 1. Communication 2. Early Literacy 3. Early Maths 4. Personal, social and emotional 5. Health benefits.	£750
2	Live Music Now Wales	The project will provide young people at risk in Troi Rownd and Canolfan Enfys pupil referral units with half-day professional music workshops, targeting improvements in engagement, communication and creativity.	£510
3	River and Sea Sense Ltd	RASS Will provide workshops, lessons and events educating young people as to the dangers of Open Water and will teach safeguarding and CPR in Flintshire schools, events and in youth groups	£980
Individuals			
4	Male	Towards to cost of climbing training and competition expenses	£500
5	Female	Towards to cost of an educational expedition to Sri Lanka as part of Degree course	£500
			£3,240

Flintshire Welsh Church Act Fund – July 2018

Groups			
1	All Saints Church, Higher Kinnerton	To renew and reinforce the louvres in the church tower	£360
2	Bretton Methodist Church	Refurbishment of kitchen facilities	£500
3	Capel Bethel, Caerwys	Replace and refurbishment of toilet facilities	£500
4	Capel Gad Cilcain	Towards the cost of repairs to the church back wall	£500
5	Music in Hospitals	To fund 2 live music concerts within residential homes in flintshire.	£279
6	North Wales Superkids	Towards the cost of renting a secure storage for items given as part of the annual Toy Box Appeal	£300
7	St Mary's Church, Treuddyn	Contributions towards the repairs of the church roof	£500
Individuals			
8	Male	Towards the cost of badminton training and competition expenses	£200
9	Male	Towards the cost of badminton training and competition expenses	£200
10	Female	Towards the cost of badminton training and competition expenses	£200

£3,539

Hawarden & District Relief in Need Fund since 2013

Groups			
1	Beechwood Road Garden Project	The creation of a community garden on a piece of currently unused land in the middle of a housing estate	£1,000
2	Douglas Place Lunch Club	To replace tables and chairs for a luncheon club	£750
3	North Wales Energy Advice Centre	To replace the boiler for a client - Mrs Hewitt	£750
4	Neuro Therapy Centre (NTC)	To purchase tables to refresh the lounge area, as a welcoming environment for service-users.	£750
Individuals			
5	Family	To replace the beds of a family with medical conditions	£750
6	Female	To purchase a laptop, books and PSE for a diploma in animal care.	£750
7	Male	Towards the cost of a training course and ice-hockey kit.	£750
8	Male	A grant was awarded to purchase a microwave and bedroom furniture	£677
9	Male	To purchase white goods and furnishings for new home after fleeing domestic abuse.	£621

10	Female	A grant was awarded to purchase new clothes and bedding, storage and a new bed.	£700
11	Female	To purchase a washing machine and dryer for a family with an autistic child to ensure his needs are met.	£480
12	Female	To purchase an adapted bed to suit the needs of someone with disabilities	£650
13	Female	Towards living costs whilst undertaking a Masters Degree	£500
14	Family	To pay for the transport costs of a holiday	£586
15	Female	A grant was awarded to purchase bedroom furniture and a tumble dryer.	£640
16	Male	To purchase a laptop, bag and printer to support educational studies.	£400
17	Female	A grant was awarded to purchase a new cooker and a stair carpet.	£550
18	Family	For a residential educational trip to Llangrannog	£480
19	Family	A grant was awarded to purchase bedroom furniture.	£750

20	Female	A grant was awarded to purchase carpet for the stairs and landing	£475
21	Female	A grant was awarded to purchase a fridge/freezer, washing machine and tumble dryer.	£600
22	Female	A grant was awarded to purchase bedroom carpet.	£390
23	Family	A grant was awarded to purchase some new clothing for the family, and some items of furniture to help make their life more manageable.	£2,020
24	Family	A grant was awarded to purchase new carpet and a sofa to help make their life more comfortable.	£750
			£16,769

CASE STUDIES

River and Sea Sense (RASS) was set up as a positive response to the tragic death of 15 year old Christopher Turnbull who drowned at Capel Curig on 14th August 2006.

A strong, handsome young man, an excellent swimmer, rugby player, leader and a good friend. On this fatal day no one could save him. One of his close friends tried but the current prevailed.



Over the past 10 years RASS has educated over 195,000 young people and adults across North Wales and beyond as to the dangers of open water. Because of the strain on our emergency services it was decided that if RASS added CPR and SABL workshops by trained RLSS Instructors this would help in many ways to reduce incidents where people were rescued and aid in the saving of lives using the education taught on a peer to peer basis. RASS works with all the

emergency services across the UK and is part of the UK Drowning Prevention Strategy. A project for 2017 worked with the Welsh Baccalaureate on a Drowning Prevention project created to teach Water Safety in a peer to peer manner saving even more lives.

There are a number of 'Hot Spots' in the local area and across North Wales where young people visit on a regular basis to have fun and which often are having to be chased away or rescued by our emergency services.

RASS provides workshops – presentations – sos events to young people and adults in particular the age range of 8 to 21. Statistics released recently and every year state that the main age for drowning is between 14 and 17 and the majority are boys. Alcohol plays a significant part as does peer pressure – however in some cases the people who drown had no intention of going in the water – this is due to poor education of the danger around open water.

Workshops For Young People/Adults – The workshops cover the story of how Christopher drowned which has a powerful impact on all. Some of the main points are CPR/SABL by trained RLSS Facilitators – Cold Water Shock – Peer Pressure – Alcohol and Drowning – Taking Responsibility For Yourself And Others – I.C.E Mobile Phone Awareness – Different areas identified i.e River Sea Quarry Reservoir Man made Open

Water Areas – Riptides – What To do In Emergency – What it's like to lose a child.

For younger children RASS runs a bespoke workshop – for the school or group – encouraging interactive responses and young people really enjoy the quiz at the end – this is invaluable as it proves how much information has been taken in. Although the sessions are fun the children absorb the seriousness of the story as it unfolds.

A grant of £980 from **Flintshire Community Endowment Fund** supported RASS to run the following workshops -

- Hawarden High School - 4 Workshops
- Argoed High School - 6 Workshops plus Welsh Bac Project
- Buckley Mountain Lane - 8 Workshops



North Wales Superkids founder Margaret Williams MBE has spent all her working life with children and vulnerable families. She has seen many situations where there are high levels of financial difficulties, domestic violence, critical and terminal illness, and mental health issues. On retirement from work as a social worker, it was made very obvious that the level of support was not going to continue for the families and would stop upon her retirement. After much soul searching and long talks with likeminded people, Margaret decided to form North Wales Superkids, and so in late May 1999 Superkids came into being.

It is hard to imagine that in this day and age, that there are children in families where even a basic Christmas will not be happening, and at no fault of the parent and certainly not the child, all for a very wide number of reasons. Social security issues, fleeing domestic abuse, fire, burglary, ill health and sheer poverty are all reasons why families might find themselves unable to buy presents in the run up to Christmas. This is why Superkids have their Christmas Toy Box Appeal which was funded in June 2018 with a grant of £300 towards renting a storage box for the Christmas Toy Box Appeal from the **Flintshire Welsh Church Act Fund**.



Every year Superkids hears about a growing number of children and families in these circumstances, and every year needs more and more new presents to bag up and send out to children and young people aged from 1-18years. It also supports vulnerable care leavers, aged 18-25 years that no longer have a family network and have possibly been in care for many years. These are children who will not be having presents unless Superkids hear about them. The numbers have risen significantly and Christmas 2015 saw Superkids handing out 1,375 bags. This is a bag of presents carefully selected as age appropriate and based on each youngster's interests. Not easy when you need an average of 14,000 presents that need to be bought, collected from drop off, sorted into categories, and then bagged. In 2016 it gave out 1,301 sacks of presents, and 2017 saw us give out a huge 1,476 sacks.

Margaret and her team of volunteers actively pursue a vision of alleviating some of the “**so many sad cases**” of some desperate families across North Wales who cannot afford festive gifts for their children due to social circumstances.

Margaret, who was awarded an MBE for her charitable work, puts all her effort into working with social agencies who put forward a child they think deserves this service by filling out a form of their age, gender, hobbies and personality traits which the team then use to choose suitable gifts.



The following is correspondence received from a recipient of **Hawarden and District Relief in Need Grant** funding. This family has received three grants from the fund, one for the family, and one for each of the children. Mum herself struggles with a number of rare conditions and disabilities. Her husband is unable to work, as her illness means she needs care 24/7. The first grant awarded to the family was for new beds to enable the family to get some better quality sleep. A dual mattress bed would especially allow the husband to sleep better knowing that his wife is more comfortable and in less pain as she will be able to adjust the bed according to her needs without disturbing him.

'I wanted to let you know how well X and Y are doing since we last spoke. X completed a first year in college and left with 3 Distinctions, 2 Passes and 2 Merits! X has now gone back to college to complete a level 3 Animal management course. Northrop College also picked up that X is severely Dyslexic and has visual stress which means the need for blue overlays for any type of reading and writing, the college also gives X extra time in exams and to undertake course work.

Y has come so far in ice hockey and is doing extremely well also. Y is now the designated net minder. Y recently had the opportunity to play in the Sheffield ice

hockey tournament and did absolutely amazing, making saves I didn't think we're possible! Y claimed second place in the tournament having only just missed out on the All Star's shirt for first place, bless him. Y is now looking for sponsorship and may possibility be put forward to play at conference level!

I'm so proud of how far they have both come and wanted to show you what the funding has helped them both to achieve. Somebody from the club has anonymously and very kindly sponsored subs until Xmas, we are so grateful as we were really struggling to pay this due to changes in the benefits system.

Thank you all once again'





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