

The Flintshire Community Endowment Fund

Presentation to Members of the Community
Profile and Partnerships Committee

9th March 2015

INTRODUCTION AND OVERVIEW

- Achievements since the launch of the Fund in September 2013
- Adding value to the Fund
- Working relationship with the Council
- The Community Foundation in Wales

THE COMMUNITY FOUNDATION IN WALES - NEWS

- Highlights of the past 18months
- New Funds at the Foundation
- Education and Enterprise
- Philanthropy Week in Wales

FUND HISTORY AND OVERVIEW

- Total Return on the Capital Sum invested of 8.5% since the launch of the Fund
 - Two Grant Panels held with decisions on grant awards made by local people
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FINANCIAL PERFORMANCE OF THE FUND

- Investment Portfolio Performance and Returns
- Investment Strategy
- Management Fees

ANALYSIS OF GRANT AWARDS AND ADDED VALUE FOR FLINTSHIRE

- Grant support for Individuals and groups
- Impact of the Hawarden Trust for Relief of Poverty and Sickness and the Dory Fund
- Further added value totalling £285,000 to support 49 projects in Flintshire since 2012

ADDITIONAL SERVICES FOR LOCAL AUTHORITIES

- Fund Management Services for Welsh Church Act Endowment Funds
- Case Study: Powys County Council
- Potential to scope the mutual benefits of the Foundation undertaking the administration and asset management of the Flintshire, Denbighshire and Wrexham Welsh Church Act Funds

QUESTIONS AND AGREED ACTIONS

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