

Impact report: Flintshire Funds



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Fund Background

Community Foundation Wales update

As we head into a third year of economic uncertainty, we are proud to say that Community Foundation Wales has continued to grow, enabling us to support thousands of organisations that desperately need assistance during these difficult times, although the ongoing impact of the pandemic continued to keep us on our toes. In the last financial year we supported over 400 groups and individuals, across every county in Wales, and distributed over £1.9 million in funding.

In April 2021, we opened back up to 'business as usual', returning to our usual schedule of funds and programmes opening and closing at set times throughout the year. Before opening each programme however, we took the time to review the fund and where possible adapt the criteria to align it with the learning from our [Loud and Clear report](#) published in September 2020 which we referred to in our last report.

It's really important to us as an organisation, that we learn from those we work with but even more importantly, that we use that knowledge to inform our work. We have considered the original objectives of both the Flintshire Community Endowment Fund and the Flintshire Welsh Church Act Fund and within the restrictions of the funds, we are happy that we are able to offer core funding alongside project funding on a multi-year funding as long as the focus of the work to be funded meets these original objectives. Critically, groups can now apply for core funding for up to three years.

Managing budgets over future years is not easy, particularly within the uncertain financial climate we are currently facing, The strong rate of growth within the funds that we have seen in recent years has helped to support the introduction of this new way of working which, with careful management over time will become a sustainable model of working. We've created a model that balances being able to support groups longer term whilst also ensuring funding is available for new work and new ideas.

Alongside awarding grants we've been working on two exciting projects:

- In partnership with the Charity Commission, we are calling on trustees to come forward and seek support to unlock the potential of dormant assets in Wales. The 'Revitalising Trusts Programme in Wales' is hoping to unlock up to £12 million of dormant charitable funds in Wales. We are offering support to trustees of inactive charities to put their charitable funds to good use. You can read more about this scheme by [clicking here](#).



- Have you heard about the 'Pears Action Learning Project' we've been working on during the last couple of years? Alongside this broader Trust & Foundation project, Pears Foundation enabled us to offer £2,000 to unlock capacity within 25 organisations in return for taking part in some research and action learning. 6 of these organisations are based in Gwent. This was not your usual grant programme and our aim was to gain a better understanding of the process required to start a successful partnership between grantees and funders whilst identifying some good practice that can be shared with others. Keep an eye out for the evaluation report that will be published during the next 6 months.

Alongside our existing funds, we have distributed funding from the following new funds across Wales within the last year:

Older Peoples Fund

Twenty-seven organisations across Wales received grants of up to £5,000 per year for up to 3 years from the Older Peoples Fund. One groups based in Flintshire – Enbarr Foundation CIC – received a grant of £4,627.

Principality Building Society's Future Generations Fund

A new partnership with the Principality Building Society has enabled us to award in excess of £100,000 worth of grants to third sector and community organisations that support young people across Wales. We were inundated with applications from across Wales and 24 third sector organisations successfully secured funding for one-year projects. We received 100 applications to this round of funding, which shows the enormous need for funding to support young people across Wales. Successful grantees will be announced in mid September.

Nation of Sanctuary Croeso Fund

This fund was launched to raise money to support charities, community groups and organisations working with people displaced by conflict who have arrived in Wales; providing them with essential items and helping them to settle in their new surroundings. It's been created as a fundraising fund and an endowment fund that will support people seeking sanctuary now and into the future. We received a £1,000,000 donation from the Welsh Government in the first week of launching the fund and we've continually fundraised since then - [Click here to read more about this fund.](#)

Your support

Did you know that you can become a Friend of Community Foundation Wales? This is an exclusive philanthropic group that is helping to change lives in Wales. Friends demonstrate their commitment to a fairer, more equitable Nation, encouraging working together as a community and supporting those who need it the most. If you or anyone you know is interested in this initiative, please contact me preferably by email – katy@communityfoundationwales.org.uk or leave a phone message including how to contact you on 029 20379580 and I will call you back.

Katy Hales

Director of Philanthropy

Fund 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 Community Foundation Wales.

The fund was officially launched in November 2013 at Airbus in Broughton. The value of the endowment on transfer was £178,998. This fund now falls under the Trusteeship of Community Foundation Wales.

In March 2018, the Clwyd Welsh Church Act Fund was also transferred to Community Foundation Wales. The Fund was to cover the Welsh Church Act funds for Flintshire, Wrexham and Denbighshire. The value of the fund on transfer was £537,497. Flintshire County Council remains the Trustee for this fund.

The distribution percentage based on the population is as follows:

- Denbighshire – 25.4%
- Flintshire – 40.3%
- Wrexham – 34.3%

Community Foundation 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.

In 2019, following conversations with Wrexham County Council, we also undertook the grantmaking element for Wrexham, using the skills of the panel set up for the Wrexham Community Endowment Fund.

We make a payment to Denbighshire County Council for grantmaking as Denbighshire Council for Voluntary Services undertake the grantmaking element of the fund for Denbighshire.

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 Community Foundation Wales. 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. A list of grants from this fund are listed on Page 18.

Overview

Flintshire Community Endowment Fund & Flintshire Welsh Church Art Fund (Flintshire Funds) grants are awarded twice a year.

The fund has its own grants panel which is made up of five members, each with good knowledge and experience of the needs within Flintshire, specifically focused on education and community, as the objectives for both funds cover these areas.

The members are nominated by the Council and serve for a minimum period of three years.

The members during the last financial year were:

- Fiona Mocko, Strategic Policy Advisor, Flintshire County Council
- Trevor Jones, Flintshire Council Officer within the Department of Education
- 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 Community Foundation Wales. Panel recommendations are presented to Community Foundation Wales' board of trustees which reviews and ratifies grant decisions. The input and knowledge of panel members has been invaluable and ensures that all grant decisions are made locally and 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 Report

Investment Portfolio

The Foundation operates a total return policy for its investment portfolio. This means that any income is reinvested, leading to stronger fund growth longer term. Each year Foundation Trustees decide on a percentage of the market value of the fund to be made available for grant making. This percentage may vary depending on the health of the fund, demand for funding and current market conditions. In 2020/21 we distributed 3.5% and in 2021/22, 4%. To enable multi-year grant-making we will increase the percentage for distribution to 5% in 2022/23.

Performance to date

In the 2020/21 year, our investment portfolio saw a remarkable turnaround from the lows seen in 2019/20 as a result of the COVID pandemic. By the end of March 2021, the fund values had been restored and the year-end values exceeded pre pandemic levels, with the total investment portfolio of Community Foundation Wales being valued at £20m. This positive economic growth continued through 2021.

As we came into 2022, we expected a continuation of the positive economic growth seen in 2021, albeit at a slower rate and this was reflected in the March 2022 investment portfolio valuation of £21.5m.

Outlook

Inflation and geopolitical risks have now risen to the top of concerns. Governments and central banks provided unprecedented levels of support during the pandemic and this, along with supply chain disruption, higher commodity prices and wage growth pressures, have led inflation to the highest levels in decades. Russia's invasion of Ukraine in February generated additional uncertainty.

Markets may remain volatile for some time however, our focus on high-quality companies, which may cause deviation from benchmark returns in the short-term as the prospect of higher inflation negatively impacts exactly the sort of companies best placed to cope with it, will win out as long-term investors as a result of their underlying quality. We believe there is still room for growth from the world's major economies 'post-COVID', which should keep corporate profits moving higher.

Flintshire Community Endowment Fund Statement

	2020/21	2021/22	2022/23
Fund Balance on 1 April	201,685	251,396	264,831
<u>Grants</u>			
Grants paid in year	(2,756)	(4,000)	
Less: paid in year but awarded in prior year	-	-	
Add: awarded but not paid in year	-	(6,000*)	
Returned grants	-	-	
<u>Admin fees</u>			
Admin fee annual @ 1.25%	(2,852)	(3,372)	
Admin fee grants @ 10%	(236)	(400)	
<u>Investment performance</u>			
Investment income	4,862	5,299	
Investment gain	50,693	21,908	
Fund Balance on 31 March	251,396	264,831	TBC
<i>Per financial statements</i>			
Funds available for distribution			
Balance on 30 September (prior year)	222,006	228,157	269,780
Distribution %	3.5%	4%	5%
Available for distribution	7,770	9,126	13,489
Multiyear grants awarded last year	-	-	(3,000**)
Multiyear grants awarded 2 years ago	-	-	-

Multiyear grants awarded 3 years ago	-	-	-
Total available for grant award in year	7,770	9,126	10,489

*3 x £1,000 per year multi-year (3 years) grants awarded therefore a further £3,000 is committed in each of the following 2 years.

** £3,000 as the second year of multi-year grants awarded in 2021/22

Clwyd Welsh Church Act Fund Statement

	2020/21	2021/22	2022/23
Fund Balance on 1 April	522,257	652,132	710,019
<u>Grants</u>			
Grants paid in year	(6,570)	(13,306)	
Less: paid in year but awarded in prior year		-	
Add: awarded but not paid in year	-	(1,000*)	
Returned grants	-	-	
<u>Admin fees</u>			
Admin fee annual @ 1.25%	(7,378)	(8,748)	
Admin fee grants @ 10%	(697)	(1,431)	
<u>Investment performance</u>			
Investment income	12,597	14,025	
Investment gain	131,883	68,346	
Fund Balance on 31 March	652,132	710,019	TBC
<i>Per financial statements</i>			
Funds available for distribution			
Balance on 30 September (prior year)	581,796	590,243	699,822
Distribution %	3.5%	4%	5%
Available for distribution	20,363	23,610	34,991
Multi year grants awarded in previous year	-	-	-
Total available for grant award in year	20,363	23,610	34,991

Allocation by Council

Wrexham 34.3%	6,984	8,098	12,002
Flintshire 40.3%	8,206	9,515	14,101
Denbighshire 25.4%	5,172	5,997	8,888
	20,363	23,610	34,991

*Not paid due to outstanding grant condition.

Summary of grants awarded

Flintshire Community Endowment Fund

2020/21 – No applications were received in Welsh this round.

Applicant	Summary of Grant	Total Amount Awarded	Paid	Scheduled future payments	Scheduled future payments
Female	Sports Grant	£200	£200	£0	£0
Female	Sports Grant	£200	£200	£0	£0
Male	Sports Grant	£200	£200	£0	£0
Male	Sports Grant	£200	£200	£0	£0
Friends Of Ysgol Maes Hyfryd	The project supports the educational development and supports individuals with sensory processing disorder. It focuses on developing key skills of communication, cognition, independence, physical development, self-care and sensory responses, all of which are transferable skills that equip pupils for life beyond the school.	£956	£956	£0	£0
Techniquet Glyndwr (trading name of North Wales Science)	The project delivered workshops in 4 primary schools based in the Flint area, to key stage 2 students and their families. The e-Bug project encourages healthy living, by involving the children and adults in hands-on activities that display the importance of good hygiene practices	£1,000	£1,000	£0	£0

and inform everyone about the proper uses of antibiotics. The e-Bug project provides educational development of school aged children, mainly aged 7-11, and using informal learning technique				
		£2,756	£2,756	£0

2021/22 – One application was received in Welsh out of 9 applications (11%). The application was successful.

Applicant	Summary of Grant	Total Amount Awarded	Paid	Scheduled future payments 2022/23	Scheduled future payments 2023/24
Buckley Ju Jitsu Club	The Ju Jitsu Club helps young people overcome bullying and poor mental health. They provide life skills by increasing their confidence and social skills.	£1,000	£1,000	£0	£0
Emerge Community Arts	Emerge Community Arts provide music and performing arts projects which support young people and adults who have learning disabilities and/or mental health issues.	£3,000	£1,000	£1,000	£1,000
North Wales Horse Watch	North Wales Horse Watch provide advice and support to equine and rural communities. Applying for multiyear funding to help cover the cost of education resources and project marketing	£3,000	£1,000	£1,000	£1,000
Speakers for Schools	Speakers for Schools is dedicated to supporting the social mobility of young people facing disadvantage. By prioritising those with the highest need, partnering with local schools, businesses and industry leaders they work to make a tangible difference to communities.	£3,000	£1,000	£1,000	£1,000
		£10,000	£4,000	£3,000	£3,000

Clwyd Welsh Church Act Fund

2020/21- No applications were received in Welsh this round.

Applicant	Summary of Grant	Total Amount Awarded	Paid	Scheduled future payments	Scheduled future payments
St Bartholomew's Church	This project enables the church to reorder the building to facilitate more activities for the local communities. This project was reworked due to the Covid restrictions they have created a social distanced drop-in centre so the community can come together.	£1,000	£1,000	£0.00	£0.00
		£1,000	£1,000	£0.00	£0.00
Wrexham Welsh Church Act Fund	Grants to groups in Wrexham	£500	£500	£0.00	£0.00
Denbighshire Welsh Church Act Fund	Grant to Denbighshire County Council who distribute this funding	£5,070	£5,070	£0.00	£0.00
		£6,570	£6,570	£0.00	£0.00

2021/22 - One application was received in Welsh out of 6 applications (16%). The application was successful.

Applicant	Summary of Grant	Total Amount Awarded	Paid	Scheduled future payments 2022/23	Scheduled future payments 2023/24
All Saints church, Ffynnongroyw, part of Bryn a Môr Mission Area, St Asaph Diocese	All Saints Church supports the whole community for all ages. They are applying for stacking chairs, foldable table and resources for craft initiatives.	£1,000	£1,000	£0.00	£0.00
Capel Bethesda, Yr Wyddgrug	Applying for a grant to replace the fire exit at the church to make the room that is rented out to the community safer for all to use.	£1,000	£0.00	£0.00	£0.00
RiverDee Community Church	RiverDee Community Church work with individuals and groups of all ages to support mental health and wellbeing and the community. Funding will help cover the cost of monthly meals.	£1,000	£1,000	£0.00	£0.00
Saltney Ferry Scout & Guide Group	Saltney Ferry Scout & Guide Group provides activities for children and young people. Funding will help cover the costs of rock-climbing permit training, sports and safety equipment	£1,000	£1,000	£0.00	£0.00
St Paul's Church	Funding will help cover the cost of installation of a toilet and kitchen.	£1,000	£1,000	£0.00	£0.00

Treffynnon Cyntaf Scout Group (Holywell)	Treffynnon Cyntaf Scout Group provides activities for children and youth people, which develops new and existing skills. Funding will help cover the cost of weekend residential.	£1,000	£1,000	£0.00	£0.00
		£6,000	£5,000	£0.00	£0.00
Wrexham Welsh Church Act Fund	Grants to groups in Wrexham	£1,750	£1,750	£0.00	£0.00
Denbighshire Welsh Church Act Fund	Grant to Denbighshire County Council who distribute this funding	£6,556	£6,556	£0.00	£0.00
		£14,306	£13,306	£0.00	£0.00

Hawarden & District Relief in Need Fund

Type	Grant Applicant	Summary of Grant	Amount
Individual	Female	Crisis Grant	£750
Individual	Female	Crisis Grant	£270
Individual	Female	Crisis Grant	£1,000
Individual	Female	Crisis Grant	£775
Individual	Male	Crisis Grant	£690
Individual	Female	Crisis Grant	£1,300
Individual	Female	Crisis Grant	£1,040
Individual	Female	Crisis Grant	£615
Individual	Female	Crisis Grant	£380
Individual	Female	Crisis Grant	£735
Individual	Female	Crisis Grant	£2,100
Individual	Female	Crisis Grant	£287

Total grants awarded since last impact report - £9,942

Case studies

Saltney Ferry Scout & Guide Group were awarded a grant from the Flintshire (Clwyd) Welsh Church Act Fund of £1,000 to provide training and equipment that would enable them to offer a greater range of activities for the young people they work with. The group provides physical, intellectual, social, emotional and spiritual development of young people to build their skills and resilience to help them to take a constructive role in society as responsible citizens, often representing themselves, their family, their group and their community at local, national and international events.

They run weekly activities including camping, kayaking, climbing, archery, target shooting, sailing, hiking, trips, challenges, youth leadership and more. This grant was specifically to develop climbing and kayaking/canoeing provision. The grant has funded four leaders to attend a climbing course and also cover the cost of a permit to enable them to put their learning into action. This will help the group to provide this activity as a reduced cost to the children and young people in the groups as they won't need to buy in external professional support.

Early this year the group took on a mammoth trip, taking 14 children on a kayaking/canoeing trip down the River Wye, covering 32 miles. The grant was also used towards the cost of buoyancy aids and cagoules to enable children to have the correct equipment and clothing to take part in this activity. The children and young people learnt new skills and challenged themselves outside of their comfort zones to improve confidence and self-esteem. They learnt how to stay safe as individuals as well as how to look out for others who may be struggling. Many more activities are planned now that they have increased the equipment they have and the skills of their volunteers to lead on various activities.



Emerge Community Arts support young people and adults who experience learning disabilities and/or mental health issues to prevent social isolation and support them to learn new skills. They were awarded a grant from Flintshire Community Endowment Fund of £3,000 over 3 years to help cover the costs of the employment of a musical technician for the Sound Express project. Sound Express is a unique band whereby everyone in the band has a learning disability.

The band writes and records their own Music and meets weekly to practice and perform to the local community. One of their volunteers who, is at risk of social isolation and long-term unemployment due mental health issues and social communication

difficulties, has been learning with them over the past 3 years has developed his skills in Audio/music production. In September, he was successful in becoming employed by Emerge Community Arts for 1 day per week to support the band in recording as part of a work placement initiative.

Since receiving the funding, the band have performed 3 gigs. The band is able to work more productively with a technician to support rehearsals and gigs. He has improved the quality of the band as he can adjust and measure it as they are playing. They have seen a huge change in the musical technician since becoming employed and he would like to take on further work with them develop more skills. He has started the recording process with them, and they are recording their first song 'Bob can't get a job!' One challenge is the recording software. The laptop used for recording broke, so they had to wait a few weeks for another one to use.





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