

# **The Flintshire Community Endowment Fund**

Presentation to Members of the Corporate  
Resources Overview and Scrutiny Committee

12<sup>th</sup> May 2016

# INTRODUCTION AND OVERVIEW

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

# THE COMMUNITY FOUNDATION IN WALES - NEWS

- .Highlights of the past 12 months
- .New Funds at the Foundation
- .Education and Enterprise
- .Philanthropy Week in Wales

# FUND HISTORY AND OVERVIEW

- .Total Return of 10.9% since the assets were transferred to the Foundation two and a half years ago
- .Three Grant Panels held with decisions on grant awards made by local people

# FINANCIAL PERFORMANCE OF THE FUND

- Investment Portfolio Performance and Returns
- Investment Strategy
- Factors affecting Fund Performance over the past 12 months
- Fund Statement

# **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 £320,000 to support 67 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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