

Changing Lives Together

Supporting communities through
the pandemic



2020

2021



Croeso

Community Foundation Wales has never experienced such challenging circumstances in its 20 year history but, out of adversity, we have without question played an important role in Wales' response to the Coronavirus pandemic. Our ability to connect donors, funders and community groups enabled us to bring additional funding to Welsh communities when and where it was most needed.

Our grant-making for the year totalled £5.5million, an astonishing twofold increase in our previous annual total. This has enabled us to support more than a thousand groups as they struggled through the pandemic.

Partnership is embedded in how Community Foundation Wales operates and this year, more than ever, this approach has been at the heart of our work. Alongside donors and funders we have built closer working relationships with Welsh Government and UK Government. I would like to pay tribute to our colleagues at UK Community Foundations and National Emergencies Trust, both of whom were vital in helping us to respond to the needs of Welsh communities during the pandemic.

In parallel to our emergency funding, we have continued to work on a number of longer term projects to help communities in Wales emerge from the pandemic. We have been working with the Charity Commission and Welsh Government to launch "Revitalising Trusts", a project to revive dormant trusts and to release funds for Wales. We also continue to work with a number of partners to strengthen Wales' ability to secure funding from UK trusts and foundations.

Our endowment funds now stand at £21 million, having recovered from the fall in the market at the start of the pandemic. Therefore, we are making good progress to achieve our strategic target of a £30 million endowment to provide sustainable funding for generations in Wales.

We are very fortunate that the Foundation continues to benefit from a strong Board with representation across Wales. I should like to thank my fellow Trustees for their hard work and support during such an unprecedented year.

No one knew what lay ahead when lockdown happened on March 23, 2020. There was fear, uncertainty and a realisation that life would never be the same again.

What amazed me was the speed at which Richard Williams and his team responded and adapted to this new situation, and the speed at which they delivered grants to communities across Wales. Rather than a Grants Panel once a quarter there were two or three a week. Rather than scaling down some of our external work, the whole team showed great flexibility to work together to deliver the enormous grants response needed.

For many, this year has been one of reflection, recognising the important things in life and how to help others. A sense of community spirit which had seemed to be lost but fortunately rediscovered. We all have a role in helping our communities to thrive.

There are many ways in which you can support Community Foundation Wales; be that setting up a fund as a donor, whether on an individual or corporate basis: joining Friends of Community Foundation Wales; leaving a legacy in your Will; getting involved as a volunteer or by simply promoting the grants we have available to distribute. We would be very pleased to hear from you.

Again, a big thank you to everyone who has contributed and supported us during this year - diolch o galon!

Alun Evans

Chair, Community Foundation Wales



Diolch

Community Foundation Wales works, alongside our supporters and community groups, to change lives.

On these pages you will see the story of our last 12 months. We set out how, with the generosity of people in Wales, we provided the support that people needed to get through this unprecedented pandemic.

Of course our work is never done, and communities in Wales continue to face huge challenges.

The brilliant community groups we work with have many of the answers to these problems – they just need a little bit of help from us all.

I hope what you read gives you a deeper understanding of our work and that you feel inspired to support us – we look forward to hearing from you.

Diolch yn fawr

Richard Williams

Chief Executive, Community Foundation Wales



Our year in numbers

£ Average grant amount

£5,237



£ Number of grants

1,157



Total endowment

£19,993,081



Total income

£6.74m

Total expenditure

92% Grants

5% Staff related costs

1% Office overheads

2% Other direct costs



Value #1

We are good partners

Success in working in partnership is essential to the ability of Community Foundation Wales to connect funders and donors with communities that need support.

We have a wide range of long-standing and new partnerships in place with donors and funders, community groups, local authorities, businesses, the UK and Welsh Governments, investment bankers, professional advisers and other organisations.

We would like to share some of these partnership success stories and encourage other organisations to join us in our work to strengthen communities in Wales.

A crucial partnership in responding to the pandemic

The National Emergencies Trust launched the Coronavirus Appeal in response to the pandemic and established a grant-making agreement through UK Community Foundations, which led to their partnership with Community Foundation Wales.



This was a substantial boost to our efforts to help fund the sector in Wales through the crisis and was the start of an agile, high-paced response.

Mhairi Sharp, Chief Executive of the National Emergencies Trust, said:

“

Community Foundation Wales have been a crucial partner to the National Emergencies Trust and part of a wider group of Foundations who have collectively supported over 13,000 charities across the UK over the past 15 months.

Within 72 hours of receiving National Emergencies Trust funding Community Foundation Wales had funds on the ground making a difference at village and street level. On the March 26, just three days into the first national lockdown, Cymru Creations received a grant of £2,000 to provide food and essentials. This marked the start of an indefatigable year of agile grant making for the team at Community Foundation Wales.

The dedication of the Community Foundation Wales team has resulted in meals, shelter, safety, support and advice for communities across Wales. The work of the Foundation and it's network has undoubtedly saved lives and supported the nation during it's time of need.



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New connections

Admiral and **Welsh Water** were among the leading Welsh businesses who were quick to support our Coronavirus appeal, ensuring that community groups in Wales were well-supported through the pandemic.

During the year we started new partnerships with **Castle Dairies**, who are contributing a percentage of their annual profits to support STEM education opportunities for young people, and **First Great Western**, who are supporting projects in communities living alongside their rail services.



Revitalising trusts

Welsh Government and the Charity Commission are partnering with Community Foundation Wales to deliver the Revitalising Trust programme. This project will release £25m that is lying idle in dormant accounts.

The Commission will be identifying charities in Wales that are either inactive (meaning they have had no income or expenditure over the last five years) or ineffective (having spent less than 30% of their total income over the last five years).

Trustees will then have an option to act – with support to help the charity get back up and running if needed. Otherwise the funds are redeployed to causes in line with the aims of the dormant charity or the trust is transferred to Community Foundation Wales to be managed for the long-term benefit of local communities.



Llywodraeth Cymru
Welsh Government



CHARITY COMMISSION
FOR ENGLAND AND WALES

Jane Hutt, Deputy Minister and Chief Whip of Welsh Government, said:

“

The Welsh Revitalising Trusts programme will help charities and trusts to bring vital resources back into play in supporting our communities in Wales.

The programme has also seen us build on our existing relationship with Community Foundation Wales, an excellent organisation which has delivered funding from the National Emergencies Trust to support organisations throughout the pandemic.



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Working with STEP

We work closely with partners in STEP, the professional body for lawyers, accountants, financial advisors and other practitioners that help families plan for their futures.

In November our manager, Donor-Advised Giving, Katy Hales, joined STEP's Spotlight conference for a session on Effective Giving Locally, looking at the crucial role community foundations play in working with philanthropists in the UK, USA and Canada.

It was a great honour for Community Foundation Wales, with the panel also including Robert Kleinman, from the Jewish Community Foundation of Montreal, and Lorie Slutsky, Chief Executive of the New York Community Foundation.

Wales based investment

Our endowment funds are how we continue to fund groups in Wales, today and for future generations.

Our funds are managed by our investment management partners – Brewin Dolphin, based in Cardiff city centre, and CCLA, who manage investments for charities, religious organisations and public sector.

Value #2

We care about
the people we
work with

We understand how important it is to feel valued, to know that others respect your views and trust your judgement.

Showing compassion helps us to build stronger, long lasting relationships, with our donors and funders, with the groups and individuals we fund, with our stakeholders and with our team.

The last twelve months have highlighted more than ever before the need to show kindness to others, to listen and to help whenever possible.

We would like to tell you about some of ways in which we have supported those we have worked with to ensure they know how much we appreciate them.

Wales Coronavirus Resilience Fund

One of the words that defined 2020 is 'pandemic' – it literally means affecting everyone. In Wales, the Coronavirus pandemic hit just weeks after many of our communities had been hit by widespread flooding.

People were suffering, not just physically due to ill health, but also emotionally, socially and economically. We strongly believe it is our responsibility to show compassion and to offer protection to those that are most vulnerable in our society.

Our Wales Coronavirus Resilience Fund was the vehicle to do that. It was the place where those that were able could come together to show their collective support.

We are grateful to National Emergencies Trust, Admiral, Waterloo Foundation, Principality, Welsh Water, Track 2000 and numerous other individuals and organisations for helping us to build a fund which distributed in excess of £5.5 million to the incredible army of charities and groups across Wales who have worked tirelessly to help people within their communities at such a challenging and ever-changing time.

We knew that groups could better use the time spent writing an application to focus on direct service delivery so we made our grant-making process as accessible and flexible as possible.

In most cases we were able to turn applications around within a week, thanks to the incredible dedication of our team and our Trustees.

We adapted our criteria as the pandemic progressed, offering funding to those continuing to respond to the emergency situation as well as to those looking ahead to the challenges of recovering from such an overwhelming global event. The needs of those we were supporting was always at the forefront of our thinking.



Adapting to the new normal

As was the case for many organisations, countrywide lockdown necessitated that the team work from home with immediate effect. It took us a few days to settle in to this new way of working and to ensure everyone had everything they needed to work safely and comfortably with access to equipment and files, etc.

We soon discovered what it means to be stuck at home, with computer screens being our only way of contact – home working and home schooling/caring via Teams and Zoom, very often at the same time, was never going to be easy.

We recruited two new members of staff and also three trustees during this time - a bit of a challenge without meeting face-to-face.

The health and well-being of our team has always been high on our agenda, and it's difficult to know if you are doing a good job, especially if you don't really know some members of the team.

To try and maintain a good work life balance and look after the health and wellbeing of the team we:

- worked hard to retain some social interaction with 'community' lunches, quizzes and tea/biscuit tasting via Teams/Zoom.



- undertook some team Health and Well-being training and a staff well-being self-assessment.
- encouraged open conversation and carried out a monthly check-in with the team.
- promoted regular screen breaks and endorsed making the best of our natural environment to recharge and relax.

Rhiannon Walsh, a Grants Officer who joined the team in October 2020 said:

“

One of the things that has struck me about working at the Community Foundation Wales is how healthy and positive the work environment is. Since my first day in October, I have been impressed with not only the emphasis that the organisation has put on mental health and well-being, but also the actions that have been taken to put it into practise. In my eight years in the Third Sector and Education Sector, I have never experienced a workplace that has made me feel so valued, understood, and listened to.



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Loud and Clear

In September 2020, we published our Loud and Clear report, bringing together the views of more than 100 groups in Wales on how Community Foundation Wales and other funders can most effectively support their work.

This report was the result of our team going out and meeting with groups and charities from across Wales, talking and most importantly, listening to what they had to say.

Time and again, we heard the same messages – they want more core funding to enable them to exist and want longer-term partnerships with funders.

What they don't want is the constant merry-go-round of having to submit short term funding applications that suck up time and energy that could be better used actually running services to help people.

Here is what a couple of the groups we spoke to told us:



North Wales Women's Centre

“Funding is an on-going challenge. Insecurity is affecting turnover of staff – people leave if they are insecure.

Sustainability is our biggest issue – not just money.

Short-term funding doesn't allow continuity and impacts what the community expects from us.”

Cylch Meithrin Wyddgrug

“There's plenty of funders who can help us to buy equipment and run projects. Our cupboards are bursting with toys and things to run activities. But we've no money to turn the lights on and pay insurance and salaries.

Finding core funding to keep us open is our biggest challenge.”

Looking ahead

As we return to 'business as usual' and begin to open our established funds again, it would be remiss of us not to use this learning to inform our grant-making.

Wherever possible we have reworked the criteria of our funds to offer both core and multi-year funding. We have made changes to our internal processes to ensure that we are able to offer multi-year funding without impacting those projects for whom one year funding is required.

If, like us, you care deeply about Wales and its people and would like to work with us to give back in any way, you can make a donation by visiting our website. If you would like to volunteer we have a number of opportunities available - we would love to hear from you.

Value #3

We make a difference

We aim to make a difference with everything we do.

This might be through the funding we distribute, the support we provide to third sector organisations or the guidance we give to philanthropists to donate to the causes they are passionate about, ensuring the maximum impact in the areas they care most about.

This year has been different in many ways and we have adapted how we work and the type of grant support we offer to meet the ever-changing needs of communities across Wales.

We have listened to what the third sector have told us and adapted how we work to make the biggest difference we can with the funding we have available.

A challenging year

The pandemic brought new and increased challenges as lockdown was announced, businesses had to close their doors, workers struggled to make ends meet having been furloughed or laid off and isolation became the 'norm' for everyone.

Our usual funds were all replaced with the 'Wales Coronavirus Resilience Fund' which was launched on March 23, 2020 for grass roots community groups and charities working tirelessly to adapt their service to support those most vulnerable to the impact of the virus.

Adapting to meet changing needs

Throughout the year we listened to what organisations required to keep going and adapted the criteria to meet those changing needs. To ensure we were cognizant of the challenges groups were facing we ran a survey during the first few weeks of the pandemic.

The groups that responded reported on average a **62%** rise in demand for support.

Food and **essential supplies** for families on low incomes was one of the biggest needs.

29% of all grants given went to projects tackling food poverty and food delivery to vulnerable people.

The survey also highlighted the struggles for groups that were usually self-sufficient with strong income from fundraising events and charity shops. Those organisations saw income fall to zero overnight as charity shops closed and all events were cancelled.

We funded a number of these groups with a grant to support core costs to enable services to continue to those that require care or support at such a critical time in their lives.

The Black Lives Matter campaign in May 2020 drew attention to Black, Asian and Minority Ethnic (BAME) cultures and highlighted the significant impact that Coronavirus was having on their lives.

We had already reached out to this sector, offering grants to help groups communicate the Government messages to save lives via leaflet drops, phone calls and online support. We will be building on this and continuing to work with these groups to improve our understanding and representation of diverse cultures.

Looking forward

In September we adapted our funding to address the change in focus we were seeing in applications. We closed our Wales Coronavirus Resilience Fund to open our Respond and Recover Fund which was supporting organisations delivering emergency response in local lockdown areas but also available to organisations focused on recovering from the crisis to develop self-sufficiency and resilience, on solutions rather than on symptoms.

During the last quarter of this financial year we have used the learning gained from the findings of the Loud and Clear Report to adapt the funding we have available for next year to champion core and multi-year funding for grass roots organisations.



A snapshot of who we have helped

Oasis Cardiff

Oasis Cardiff supports refugees and asylum seekers to integrate and be involved in the local community of Cardiff and wider afield.

A grant from the Wales Coronavirus Resilience Fund enabled them to provide daily, culturally appropriate meals and food parcels during the lockdown to those that would usually attend the centre.

Morrison, Volunteer

"I left Sudan when I was 18 years of age due to the war that had broken out. The journey was really difficult.

I was with my friend and he got killed on the way. Losing my friend was so hard and the things I have been through during the journey is something you can barely forget in your mind.

Oasis helped me rebuild myself, it's like home for me. I am so grateful to be able to repay back the community for what they have done for me."



Reynette Roberts, Director

"Food is essential and is what brings people together and makes people feel the same as each other.

When restrictions have allowed we have also used our adapted car park with our food trailer and a marquee to allow clients to sit to improve mental health and allow social interaction.

Many have commented on how much it has helped them to have a safe space to come to during this difficult time."



MS Society Cymru

The MS Society Cymru moved quickly to support people with Multiple Sclerosis (MS) when the Covid-19 pandemic hit in March 2020. Many of these people were “shielding” due to being deemed high risk, whilst others self-isolated due to mixed messages and confusion.

They were unable to support people in the traditional way - through face-to-face activities and engagement - so rapidly adapted their services to provide an online ‘Health and Wellbeing Hub’ offering support and a programme of activities to their MS community. This service helped to mitigate the challenges of the pandemic - keeping people with or affected by MS connected and mobile in their own homes.



Below, Jackie explains the importance of the Health and Wellbeing hub:

“ I’ve only been out of the house three times since last March. I don’t have to shield but I’m vulnerable when I’m out as I can’t get out of the way of someone quickly.

I live on my own, my daughter and a local volunteer shop for me. I’ve always been independent and done my own thing, giving the reins to somebody else has been difficult but I’ve had to get used to it.

Things are so different now but we make sure that we stay connected even if it’s just phoning someone, we are always at the end of the phone.

Being online has meant that I have taken part in activities I wouldn’t normally do. I’m now doing tai chi, physio, yoga, coffee morning, bingo, quiz, knitting and crafts, choir, pub and time to chat. I’m so busy now I wonder, what did I do with my time before?

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Help Harlech

Harlech

Help Harlech received a grant to support the daily need for its services and allow for the purchase of PPE equipment for its volunteers, to protect them on their frequent delivery runs.



Bike to the Future

Powys

Bike to the Future’s grant helped them to use their electric assist cargo bike to distribute food and vegetable bags in the local community.

Making new friends

We have been welcoming lots of new individual and organisation level Friends to Community Foundation Wales this year, and are grateful for the support we receive from each of our members.

We have recently introduced 'Gift memberships', enabling supporters to nominate a person to receive a membership to the Friends of Community Foundation Wales network, and gift them the annual membership cost.

For the annual membership donation of £100 for an individual or £500 for an organisation, Friends can:

- highlight their connection to Community Foundation Wales
- demonstrate their support for a local Welsh charity
- receive priority invitations to our events
- receive a personal thank you on our website and in our annual review
- have press, online and social media promotion opportunities

You can find out more about memberships and Gift memberships here.

Below, some of our Friends explain why they joined the network:



**brand
content.**

"It's everyone's responsibility to drive a positive change in their community. It's easy to get lost in your own world, going about your daily life and not considering those who don't have the same opportunities. But if we all give a little, we can create equitable opportunities and a better world for everyone."

Kevin Gardiner

"Pleased to be able to give a little bit back to my local community via Community Foundation Wales' targeted support."

Diane McCrea

"When I found out what fantastic work Community Foundation Wales does, and particularly in supporting our communities in Wales during Covid, I wanted to give my support by becoming a Friend. It is an easy way to know that my small contribution is really making a difference."



JONES BROS
CIVIL ENGINEERING UK

"We are pleased to be a Friend of Community Foundation Wales, and are always keen to support local community projects in Wales."

The challenge ahead

It is undeniable that the world has become a completely different place since the start of the pandemic.

There's been an increase in charitable giving, but also an increase in concern about how charitable donations have been spent.

This highlights to us the importance of trust when giving.

At Community Foundation Wales, building up that level of trust is integral to our work. We aim to ensure all of our supporters feel confident that they can:

- Trust that the money is going to the right place
- Trust that it is being spent wisely
- Trust that funding is making a lasting, tangible difference

Our grant making expertise and knowledge of grass roots projects in Wales combined with generous donations from our supporters ensures that funding reaches communities in all parts of the country.

We go beyond simply offering grants to individuals and organisations. We connect people and funding to projects and ideas that create positive change and sustainable solutions for communities across Wales.



New partnerships

This year we have welcomed several new fund holders.

Castle Dairies have opened an annual corporate fund, investing a percentage of their profits each year. The Castle Dairies Fund has a focus on supporting young people in further or higher education needing support within the county of Caerphilly and those studying STEM subjects will be given priority.

We have also opened the Seaburne fund, an Immediate Impact fund. The Seaburne Fund is Wales wide with a focus on supporting people in further or higher education who have a genuine need for financial support, and for whom further educational opportunities would not be possible without additional financial support.

You can help us do more

Setting up a fund with Community Foundation Wales is the easiest and most effective way of giving money to local causes without having to set up a foundation or charity yourself. Giving through us will allow you to focus on how and where you want to give.

Whether you want to donate funds for an immediate impact or establish a long-term legacy, we can help you to channel your giving to what really matters to you and create sustainable change.

When you give to Community Foundation Wales, you are not just giving a donation - you are communicating to us that you believe in this work, this mission to improve lives in Wales, and the team that makes it all happen.

If this is something that you are interested in, please do get in touch to discuss how we can help you to achieve your philanthropic aims, both now and for the future.



Community Foundation Wales
St Andrews House
24 St Andrews Crescent
Cardiff
CF10 3DD

02920 379580

www.communityfoundationwales.org.uk



info@communityfoundationwales.org.uk



[@foundationwales](https://twitter.com/foundationwales)



[@walescf](https://www.facebook.com/walescf)

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