

# Annual Review

## 2014/15

**Raising  
funds for  
those most  
in need.**



**Dorset  
Community  
Foundation**





## Chair of Trustees **Ashley Rowlands**

This is my final year as Chair and I am stepping down in December, so the writing of this report has prompted me to reflect on the past four years rather than just 2014/15.

When I took up the post of Chair it is fair to say that the Foundation was in a delicate state both financially and organisationally. I am very proud of what the Board and staff have achieved in turning the business around. It is important for the Foundation to be seen as a business and for us to demonstrate that we are a lean and efficient operation. We receive no funding from government making us totally reliant on income from the management of our endowed funds and other grants. In recent years we have developed a whole range of initiatives to encourage philanthropy in Dorset. In spite of building strong foundations, developing local giving is the one key area of our work which hasn't developed as I would have hoped and yet it is the most vital part of our future success.

When I hand over the reins to the new Chair, the challenge is to grow our funds. We have great networks and so many more people know about us and the value that we bring to the county. We also know there is a lot of wealth in the county and we have to convert good people who have money to the idea of setting up their own funds which will be their legacy to support the causes they believe in or issues affecting their local communities. Our *raison d'être* is to advise and support this process and fly the flag for Dorset giving.

Well before I joined the Foundation I'd fallen in love with Dorset. To find an organisation which is

dedicated to supporting, maintaining and enriching the lives of the people who live here seemed a perfect cause to be involved with. During my time as Trustee and Chair I have experienced first hand the life changing impact of relatively small amounts of money on communities. Despite being a small team we are achieving so much – I refer you to this publication to prove the point.

Borrowing from the old Chinese curse, we are living in interesting times. Welfare cuts are going to have a significant impact on many sectors of our communities, whether children or elders, rural or urban. If we want to see a healthy, happy Dorset in the future, with people looking forward with hope and aspiration, then this is the time more than ever to think about giving locally.

***My passion for the Foundation movement is unabated and I will continue to be involved and try to pass that passion to as many as I can.***

Finally, I want to take this opportunity to express my heartfelt gratitude to all the wonderful individuals who have donated their time, energy, money and







Our Chief  
Executive Tracy  
Melling with Chair of  
Trustees Ashley Rowlands.

support during my time as Chair. We have great staff in the office too and I have to make a special mention to Tracy Melling, our Chief Executive, who has lived and breathed the Foundation with me over the last three years. Without her there is no way we would be the organisation we are today. Thank you all for making a difference and long live the Dorset Community Foundation!

**Ashley Rowlands** | Chair of Trustees

## Chief Executive Tracy Melling

Whilst writing the copy for our annual review, I was reflecting on how lucky I am to live in such a diverse and beautiful county, with its award winning coastline, chocolate box villages and rolling hills. Yet amongst all this, Dorset has 13 areas in the top 20% most deprived in the country! With public sector funding falling, growing inequality and poverty are a threat to us all - the most unequal societies are the most dysfunctional and we will all need to take some responsibility to help build stronger communities.

Last year we produced our Hidden Dorset report that highlighted four key issues which are of particular concern, an increasing older population, young people (NEETS), mental health and rural isolation. Our main focus is to build our endowment, to help provide strategic grants to support local organisations tackling these issues under the umbrella of The Dorset Fund. Last year we were only able to fund 40% of the total applications we received.

Our purpose going forwards is to persuade and encourage more people to give and through giving, become a catalyst for change whilst experiencing personal fulfilment and pleasure. It seems clear to me that there has never been a greater need or a better time to be involved with Dorset Community Foundation. Please help us spread the word and if you would like to find out more about how you can get involved and support our work, we'd love to hear from you!

**Tracy Melling** | Chief Executive





Thank you to all of our supporters who continue to help us make Dorset a vibrant place to work and live.

## Patrons

HM Lord-Lieutenant of Dorset, **Mr Angus Campbell**

**Captain Michael Fulford-Dobson,**  
CVO, OBE, KStJ, JP, DL, RN

## Trustees

**Ashley Rowlands** Chair  
**The Hon Henry Digby** ACA Vice Chair

**Peter Eales**

**Nick Fernyhough** FCA CTA DChA

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**Victoria McDonaugh** DL

**Catriona Payne** DL

**Stuart Semple**

**Jane Stichbury**

**Sara Weld**

**Mark Woodhouse**

## Staff

**Tracy Melling** | Chief Executive

**Daisy Ilchovska** | Marketing & Communications Manager

**Colleen Peters** |  
Office Administrator

**Clare Rance** | Trusts and Grants Manager / Part Time

**Lorna Trent** | Education Fund Manager / Part Time

**Kirsty Whitfield** |  
Bookkeeper / Part Time

“Working in the office with such a friendly team has helped to regain my confidence and improve my skills. I love volunteering for the Foundation as I know that the time and skills I donate will help those most in need across the county. Juliet Barton, Volunteer”





Overview

# Grant making

In 2014-15 the Foundation distributed just over £316,000 to individuals, community groups and local charities from fourteen different Funds.

We have supported **471 individuals** including fishermen affected by the storms of 2014 through our collaboration with the Fishmongers' Company Fund and older people facing fuel poverty through our Surviving Winter Appeal where we worked in partnership with local charities. We also piloted our Bursary Scheme – a new way for the Foundation to support young people studying for vocational qualifications. We awarded **22 bursary grants** to contribute towards travel costs, essential clothing and equipment to young people from low income families who were often facing additional challenges such as disability, caring responsibilities or coping with family illness. This funding enabled them to access or continue their education or training, helping them reach their full potential.

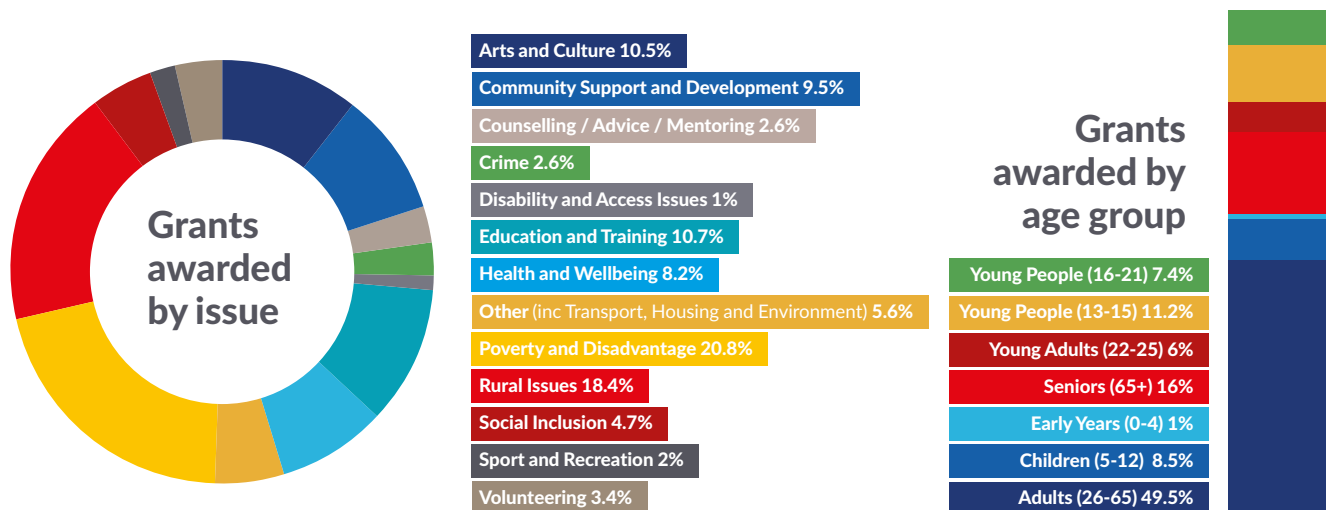
This year we funded **82 projects delivered by grassroots community organisations** and local charities supporting tens of thousands of people across Dorset,

Bournemouth and Poole. One of the strengths of a community foundation is our ability to fund a wide range of projects and issues affecting different communities addressing social isolation, exclusion and disadvantage. The charts below show the age range and primary issues supported.

Whilst the number of Dorset residents we have been able to support in 2014-15 is considerable, sadly our grant panels have needed to make difficult decisions, as we were only able to support 40% of the total requests for funding.

By focusing on our Dorset Fund priorities we are developing our strategy to attract more donors to address key issues. We are also exploring ways to collaborate with local stakeholders to make more funding available to support community groups and charities in Dorset.

**Clare Rance** | Trusts and Grants Manager





# Grants Awarded by Area



**£316,000**  
awarded in grants.

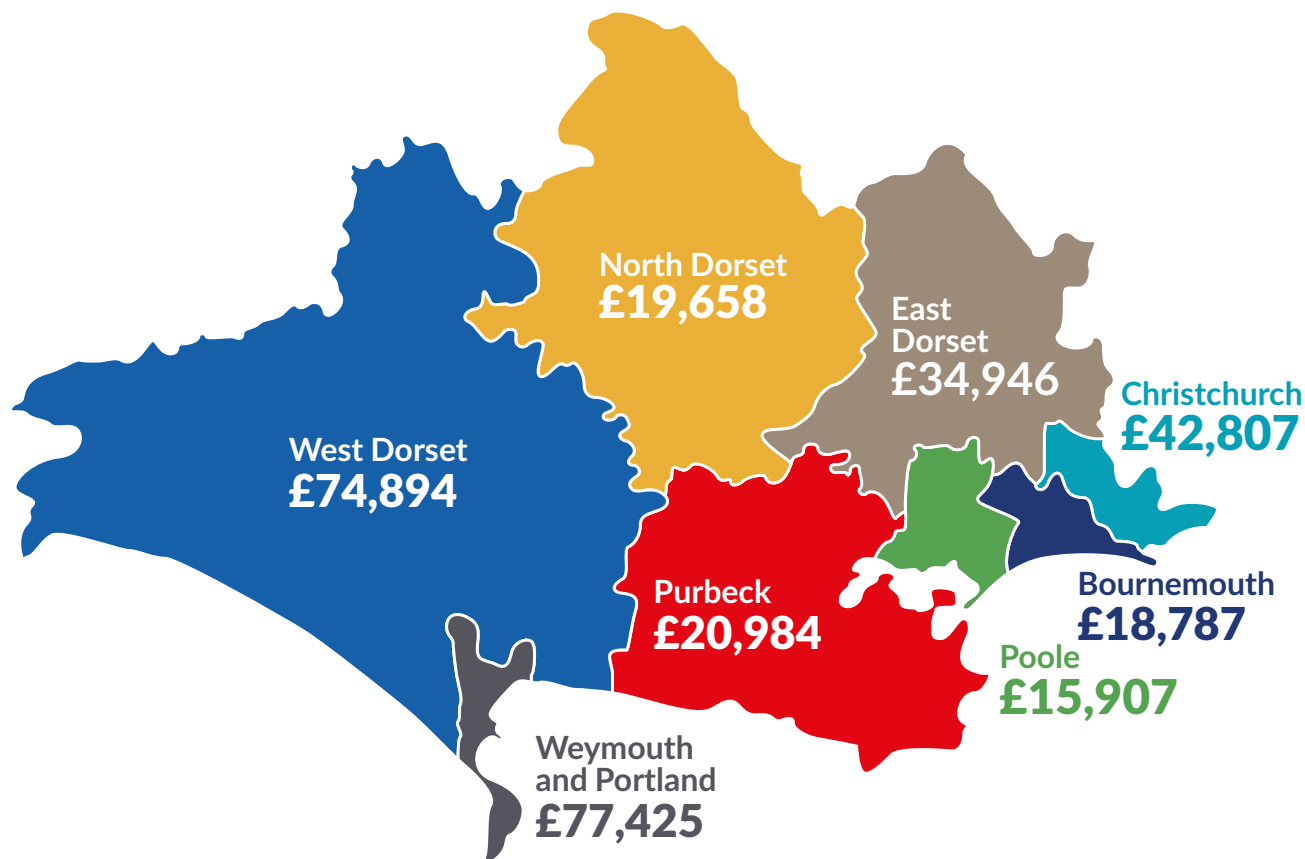


**471**  
individuals  
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**82**  
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including: fishermen  
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disadvantaged young  
people studying  
vocational qualifications.





# Grants Awarded during the year

## DCF Bursary Scheme

22 young people from disadvantaged backgrounds received bursaries from us to help continue their vocational education.

**Total Grants: £13,973**

## Fishmongers' Company Fund

17 fishermen received grants to replace fishing equipment damaged in the storms of 2014.

**Total Grants: £49,880**

## Bournemouth and Poole College Foundation Fund

13 students received funding for transport costs.

**Total Grants: 2,730**

## Flood Recovery Fund

7 families received funding to support household and business damage caused by the storms of 2014.

**Total Grants: 32,500**

## Edwards Fund

Bridport Literary Festival £500  
Dorset Community Foundation £10,000  
Surviving Winter Appeal £300  
Beaminster Festival £500

**Total: £11,300**

## Surviving Winter Appeal Fund

62 older vulnerable people were supported through individual grants distributed through the Citizen Advice Bureaus across Dorset and another 350 were supported through winter warmer packs delivered through Faithworks Wessex and Age UK Bournemouth and Dorchester.

**Total: £19,652**

## The Meggitt Fund

Bridport and District CAB £250  
Verwood Friendship Club £250  
The Little Creche (Dorset) CIC £250  
Willow Tree Group £250  
Teen Challenge East Dorset £250  
Ideas2Action £102  
Read Easy- Bridport £245  
Townsend Community Association £197  
Double Act Disability Theatre Company £250  
Hadland Foundation £228  
Gillingham Community Church £228

**Total: £2,500**

## Dorset Community Education Fund 0-16 Years

Boscombe Community Interest Charity £1,350  
Loders Youth Club £500  
The Bus Stop Club £1000  
Christchurch Open Award Centre £1,483  
Southfield Riding for the Disabled Group £1,190  
B Sharp £1,500  
Creative Kids £1,500  
The Dorset Writers' Network £1,500  
The Bourne Academy Parent Voice Team £1,500  
Deed (Development Education In Dorset) £1,500  
Steps in Time £1,475  
Bournemouth Youth Marching Band £880  
Dorset Badminton Association £1,000

**Total £16,378**

## Poole Communities Fund

Faithworks Wessex £500  
Chestnut Nursery £458  
Ideas2Action £486  
Life Education Wessex £500  
Age Concern Poole £500

**Total: £2,944**

## Dorset County Council Fund

Age Concern North Dorset £2,660  
Volunteer Centre Dorset £4,495  
Motcombe Community Shop £1,470  
Swanage Pier Trust £7,500  
AIR FM Community Interest Company £7,343  
Dorset Archives Trust £3,100  
Water Lily Project £5,950  
Langton Herring Village Hall £5,000  
The Bus Stop Club £3,500  
Christchurch Open Award Centre £7,240  
Lyme Regis Development Trust £5,947  
Walford Mill Education Trust £3,750  
Age UK Dorchester £4,450  
B Sharp £7,500  
St Leonards and St Ives Scout and Guide Joint Headquarters Committee £7,500  
The Dorset Writers' Network £2,350  
Dorset Rape Crisis £7,177  
Streetlight £2,250  
Mid Dorset Mencap Group £5,000  
1st Charmouth Scout Group £7,500  
Gillingham Bowling Club £1,500  
Shaftesbury & District Carers Association £1,622  
Holt Parish Hall Trust £7,350  
Sherborne Steam & Waterwheel Centre £2,486  
Christchurch Food Bank £7,500  
Sturminster Newton Orchestra £1,500

**Total: £123,640**

## Dorset Communities Fund

Bridport and District CAB £450  
Friends of Charmouth Library £400  
One Voice Choir £490  
Bus2Go £500  
Life Education Wessex £500  
1st Charmouth Scout Group £447

**Total: £2,787**

## Comic Relief Local Communities Fund

Bournemouth Citizens Advice Bureau £2,000  
Colehill and Wimborne Youth and Community Centre £2,150  
Dorchester Social Stroke Club £1,500  
Hope Housing, Training and Support Ltd £1,031  
South Dorset Community Sport Trust Ltd £1,800  
The Friendly Food Club £1,870  
B Sharp £2,500  
Iford Baptist Church £1,610  
Sessions Music and Heritage Youth Club £8,290  
The Training and Learning Company £1,800

**Total: £24,552**

## Bournemouth Communities Fund

Dorset Mind £500  
Autism Wessex £364  
Bournemouth Fellowship of Clubs £500  
Life and Money Skills £400  
The Training and Learning Company £400  
Chrysalis £500  
Vita Nova £250  
Handiworks Plus £500  
Life Education Wessex £500

**Total: £3,914**

## S&L Community Learning Fund 19-65+

Footprints £4,960  
C-Waves Diving £4,400

**Total: £9,360**

Total Grants  
**316,110**







# The Dorset Fund

The Dorset Fund was set up to support issues affecting our county now and in the future. We produced the Hidden Dorset Report which identified key issues affecting Dorset in the coming years. This helped us identify the main funding priorities: older people, young people and mental health.



## The Neighbourhood Fund

### Supporting the growing older population

Over a quarter of Dorset's residents are over the age of 65 and their numbers are predicted to increase in the future.

Older people bring a lifetime of skills and experience and make a significant contribution to community life in our county, however the needs of our growing older population also places an increasing demand on already constrained health and welfare services.

Large numbers of older people in need turn to local charities for help with a variety of issues including health and wellbeing, transport, fuel poverty, social isolation – to name a few.

Our Neighbourhood Fund was established to fund charities and community groups supporting local older people, helping them lead more healthy and independent lives.

“When you have nobody to make a cup of tea for, when nobody needs you, that's when I think life is over.”

Audrey Hepburn





## Education Fund

Helping young people overcome obstacles to reach their full potential



Levels of achievement among young people in shire Dorset are lower than those for the South West region and the rest of England.

The Education Fund was established to ensure all young people have equal opportunities to access education and training and reach their full potential – despite their background or location.

The Fund has two elements – the DCF Bursary Scheme and the Raising Aspirations Mentoring Programme.

The DCF Bursary Scheme supports, through bursaries of up to £1,000, disadvantaged young people aged between 16-21 in vocational training and education.

The Foundation received a grant from The Goldsmiths' Company to establish an in-school mentoring programme. The aims of the mentoring programme are to help young people develop confidence, self-esteem, communication skills and broaden their horizons.



## Arts and Minds Fund

Engaging in the arts to prevent mental health illness and build general well-being

Most people have experienced or have been affected by mental health issues at some point in their lives – it affects people across all ages.

By making a donation or leaving a legacy to the Dorset Fund (or the specific funds within it) we will ensure that your contribution will support those most in need across the county.

Our Arts and Minds Fund will support creative arts projects that help prevent or alleviate mental health illnesses across all ages.





# “ Our Stories

Although funding distributed in 2014/15 covered all issues affecting local communities, these case studies focus on the three major themes that are being supported by our Dorset Fund: older people, young people and mental health.

## Walford Mill Education Trust

**Grant size:** £3,750

**Fund:** Dorset County Council Fund

**Focus:** Mental Health and Arts

### Hidden Dorset Report Statistics:

- Around 130,000 people in Dorset have experienced a mental health issue at some point.
- Projects that use creative therapy such as crafts, music and dancing have a powerful effect on the state of mind.

The project aimed to bring older, isolated people together with younger participants in intergenerational craft activities with the key aim of improving health and wellbeing. The taster sessions were targeted at older people who would participate in a social activity to combat isolation. It also provided an opportunity for young people to learn about arts organisations and how to put together a public exhibition.



“ The grant enabled us to widen our reach and experiment by piloting new ways of working to reach people who might not ordinarily visit the gallery. Bringing different generations together to learn craft skills and collaborate on making new work with inspirational craftspeople has been a delight and spurs us on to continue to address social isolation and improve mental health through extending our contemporary craft projects in future. ”

**Louise Evans** | Chief Executive



# Bourne Academy Parent Voice Team

**Grant size:** £1,500

**Fund:** Dorset Community Education Fund 0 - 16yrs

**Focus:** Young People and Education

## Hidden Dorset Report Statistics:

- Thirteen areas in Dorset fall into the top 20% most deprived nationally for education deprivation (up from 10 in 2007).
- Levels of achievement are lower in Dorset than those for the South West region and the rest of England.

The grant helped the Academy set up a gardening club which encouraged all students to join in. A large percentage of young people at the Academy are from extremely disadvantaged backgrounds – the school is in the 10th most deprived area of the UK and 1/3 of their students receive Free School Meals.



“The benefits of the Eco club are that the students have learned to work as a team and take responsibility for something that needs their care and attention. They have learnt that it is necessary to communicate with each other to achieve an end goal. The project has taught them how to be patient waiting for the seeds to grow and then the plants to show their fruit.”

**Caroline Gobell** | Project Coordinator and Business Director

# Hadland Foundation

**Grant size:** £228

**Fund:** Meggitt Fund

**Focus:** Older People

## Hidden Dorset Report Statistics:

- Dorset has the largest older population of all counties in the UK – 27%.
- Forecasts predict that by 2030 almost 40% of Dorset's residents will be of retirement age or above.
- 14,000 local residents are intensely lonely (based on the Campaign to End Loneliness).

The small grant made Christmas special for 57 elderly residents of two care homes who have no local family or no family at all.

Reduced social networks and lack of social contact has real health consequences on the aging population. Research shows that social isolation is as strong a factor in early mortality as the detrimental effects of smoking and excess alcohol consumption.



“The grant enabled us to buy and fill over 50 Christmas stockings for older residents at two local care homes, because like the children with 'Mission Christmas' they receive no or very few presents. The project involved buying the stockings and gifts, making up the stockings and delivering them – with a member of staff dressed up as Father Christmas!”

**Audrey Davies** |  
Chair of Trustees



# Giving

Since our inception in 2000 we have distributed over **£10 million** in grants. By working with individuals, companies and trusts our funding has transformed thousands of lives across local communities.



## Individuals and Families

The Foundation offers a bespoke service to individuals and families who have an affiliation to Dorset and would like to give back to the county. We will work with you to establish the parameters, focus and criteria for your fund, including undertaking research on your behalf into specific causes, issues or geographical areas you wish to support.

## Corporate Giving



Responsible businesses are playing a larger role in creating social benefit. The public is more likely to engage with a company which helps improve communities. By setting up a corporate named fund with the Foundation, we will use our grant making expertise to help make your charitable giving effective, with demonstrable impact that is also relevant to the geographical area or the industry your business operates in.

Superior Seals Ltd, a local engineering company chose to set up a corporate fund with the Foundation to help support local young people in STEM education.

“Our Superior STEM Fund enabled us to expand our commitment to young people in education. Collaborating with the Foundation has made our charitable giving not only relevant to the industry we operate in, but also effective, with real impact. We have recently supported five young people from disadvantaged backgrounds who now have the opportunity to reach their full potential by starting or continuing their STEM education.”

**Mark Wallis** | Commercial Director at Superior Seals Ltd.





## Professional Advisers

We work with professional advisers and their clients who want to give back to their community. The Foundation offers tailor-made and time-saving solutions relating to leaving a legacy, setting up an individual or a corporate fund or transferring an existing charitable trust.

Funds set up with the Foundation are a cost-effective and tax-efficient alternative to setting up a charitable trust and can offer flexibility around degree of involvement, the cause or geographical area supported or the level of anonymity.



## Trusts and Foundations

Dorset County Council chose to transfer five education trusts with similar aims into our DCF Bursary Scheme. By transferring the trusts the Foundation was able to ensure they were achieving their original objective – to support young people in education.

“The trust transfer was only completed a couple of months ago and the money transferred into an endowment fund is already supporting young people in education and training and will do so for future generations.”

**Chris Scally** | Joint Commissioning Manager at Dorset County Council



## Community Benefit Funds

We manage community benefit funds working in partnership with companies that would like to make charitable investments in the communities they are working in. These types of funds are often linked to large developments – housing, leisure or renewable energy. The Foundation offers a professional, efficient and flexible service, which avoids the need to set up a new charitable trust.



# Giving beyond your lifetime



We can help you create a unique and lasting tribute to your community which reflects your personal wishes, supports the causes and issues or the area you care about and benefits future generations in the years to come.

## Leaving a Legacy to the Dorset Fund

If you care about Dorset and would like your charitable bequest to support those most in need, leaving a legacy to the Dorset Fund is the best option. Read more about the Dorset Fund on pages 06-07.

### Marjorie's Legacy Gift

**It is because of a legacy that was left to the Foundation by the retired teacher Marjorie Gordon that we are able to support a large number of young people from disadvantaged backgrounds in vocational education through bursaries.**



“ I would not be able to study at Brokenhurst College without this bursary, it has made all the difference to me. I would like to go to university when I finish and do a degree in either Geography or Business Studies. I would like to find a job that enables me to travel as I would like to see the world. ”

**Miss P.** | West Dorset

## Setting up a Named Legacy Fund

Larger legacies of, for example, £25,000 or more, can be used to establish a unique Named Legacy Fund with the Foundation similar to the Marjorie Gordon Fund.

## Supporting Existing Charities and Community Groups

Your legacy may also support smaller local charities and community groups. We can distribute your donation over a number of years and if some of the chosen charities cease to exist we can ensure your gift reaches organisations with similar aims.

For more information on leaving a legacy please contact our Chief Executive **Tracy Melling** at [tracy@dorsetcf.org](mailto:tracy@dorsetcf.org) or on **01202 670815**.

Alternatively, please visit our website [www.dorsetcommunityfoundation.org](http://www.dorsetcommunityfoundation.org) where you can find more information including Letter of Wishes Agreement.



# Our Finance

## Summary Balance Sheet at 31 March 2015



	Unrestricted funds £	Restricted Funds £	Endowment funds £	2015 Total funds £	2014 Total funds £
<b>Fixed Assets</b>					
Tangible assets	690	1,766	-	2,456	3,517
Investments	-	-	1,305,667	1,305,667	1,201,407
	690	1,766	1,305,667	1,308,123	1,204,924
<b>Current Assets</b>					
Debtors: amounts falling due within one year	2,301	2,441	-	4,742	21,893
Cash at bank and in hand	45,603	224,654	43,225	313,482	365,024
	47,904	227,095	43,225	318,224	386,917
<b>Creditors</b>					
Amounts falling due within one year	(10,118)	(12,100)	-	(22,218)	(158,592)
<b>Net Current Assets</b>	37,786	214,995	43,225	296,006	228,325
<b>Total Assets Less Current Liabilities</b>	38,476	216,761	1,348,892	1,604,129	1,433,249
<b>Net Assets</b>	38,476	216,761	1,348,892	1,604,129	1,433,249
<b>Funds</b>					
Unrestricted funds				38,476	49,496
Restricted funds				216,761	195,736
Endowment funds				1,348,892	1,188,017
<b>Total Funds</b>				1,604,129	1,433,249



Read our full accounts on our website  
[www.dorsetcommunityfoundation.org](http://www.dorsetcommunityfoundation.org)



**“I can do things  
you cannot, you can  
do things I cannot;  
together we can do  
great things.”**

Mother Teresa



**Dorset Community Foundation**  
**The Spire, (Formerly High Street Methodist Church)**  
**High Street, Poole, Dorset, BH15 1DF.**  
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**[www.dorsetcommunityfoundation.org](http://www.dorsetcommunityfoundation.org)**

**f Facebook DorsetCF**  
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Registered Charity 1122113



*The  
GOLDSMITHS'  
Company*

CHARITY & EDUCATION



**LOTTERY FUNDED**

Quality accredited by  
UK Community Foundations  
to standards endorsed by  
the Charity Commission



**UK Community  
Foundations**  
for thriving communities