

# ANNUAL REPORT 2015

**Charitable Trusts**  
**West Midlands**



[www.ctwm.net](http://www.ctwm.net)

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

## CHAIR'S REPORT



2015 was a special year for us, as we marked our 40th Anniversary. We took the opportunity to reflect on our history and development, current structure and purpose and future needs to ensure our organisation remains vibrant, in touch and useful to its members.

We had a stimulating programme of events throughout the year. This included four Roundtable Discussions facilitated by experts in their field and our 2014 AGM with Keynote Speaker Diana Leat who has held research posts in universities in the UK, the US and Australia, as well as think tanks including Policy Studies Institute and Demos. We also held a Seminar on a key topic of present day concern – food poverty and the role of food banks, and our 40th Anniversary Conference. Celebrating 40 years of supporting grant giving and philanthropy in the West Midlands in 2015, and acting on our development plan to build partnerships and develop work outside Birmingham, we took the opportunity to combine our Annual Conference with Sandwell Council for Voluntary Organisations (SCVO)'s annual Meet the Funder in an event we called West Midlands Funding 15. The conference and funding fair was a great opportunity to share and learn from each other's experience and perspective of grant giving and develop good practice in grant making, explore matters of common concern, and forge productive relationships that contribute to the wider benefits and overall sustainability of the region's voluntary and community sector. The event was an overwhelming success and we are considering a similar event, albeit more tailored, for 2016. You can see a list of our events later in this report and read more about them on our website [www.ctwm.net](http://www.ctwm.net).

I believe CTWM is an essential and challenging network for trusts and foundations, and for the voluntary and community sector, and look forward to working with the Executive Committee, Secretary and members in the year ahead to continue to build on our partnerships and potential alliances with other relevant regional organisations, making the organisation stronger and giving it a more powerful voice in the region.

**Pauline Roche**

## SECRETARY'S REPORT

We are delighted to have been awarded a further three years funding from the Barrow Cadbury Trust (BCT), with complementary small grants from two further CTWM members, which has allowed us to continue to develop our membership offer, events and activities and support our members in sharing and adopting best practice in grant giving. The funding will also enabling us to seek help with developing our approach to marketing and communications and, with support from Sally Edwards (@SpotOnCIC), we are working towards communicating our messages more widely and professionally.

### **Membership**

In 2015 three trusts/foundations joined CTWM (Westhill Endowment, Wolves Aid and Heart of England Community Foundation) joined during the year, two trusts wound up and one is now administered by another foundation, leaving membership at the same level overall.

At the end of December 2015 there were 30 Trusts, two associate organisations, five individual members and six honorary members.

The total membership based on subscriptions paid is 67 (Trusts can nominate up to 3 members per subscription).

**Dipali Chandra**

## Executive Committee

(at 31/12/15)

**Steve Baylis** – Head of Development, Archdiocese of Birmingham (formerly of SCVO)

**Carolyn Bettis** – Trust Administrator, William A Cadbury Trust

**Melinda Connelly** – Regional Manager, Central Region, BBC Children in Need

**Peter Hughes** – Regional Manager, Charity Bank

**David Owen OBE** – Chair, Rubery Owen Holdings Charity

**Donald Payne** – Bewley Charitable Trust (Vice Chairman)

**Debbie Pippard** – Head of Programmes, Barrow Cadbury Trust

**Pauline Roche** – Managing Director, RnR Organisation (Individual Member) (Chair)

**Steven Simpson** – Chief Executive, Harborne Parish Lands Charity (Treasurer)

The Committee met four times during the year and the meetings were generously hosted by Anthony Collins Solicitors and Harborne Parish Lands Charity.

### Ambassadors

We were delighted to welcome Judy Dyke and Robert King to the newly-created role of Ambassador in 2015. They are helping us to raise the profile of CTWM and gain new members and supporters. Read more about them on our website: [www.ctwm.net](http://www.ctwm.net).



JUDY DYKE



ROBERT KING

## Events Calendar 2015

### Thursday 15th January

**Roundtable Discussion:** Planning for Succession in Trusts Brian Wheelwright, CE, Wates Foundation at Anthony Collins solicitors (@ACSLLP) (**Attendance 20**)

### Monday 23rd March

**AGM and Talk: Foundations:** Perpetual Life, Spending Out and Other Options Diana Leat PhD at BBC Children in Need (@BBCCiN) (**Attendance 18**)

### Thursday 23rd April

**Roundtable Discussion:** Alternative Giving and Funding Led by Young People Immy Kaur, Co-founder, Impact Hub Birmingham (@ImpactHubBum) and Parminder Jutla, UnLtd (@UnLtd) at Harborne Parish Lands Charity (**Attendance 18**)

### Tuesday 21st July

**Roundtable Discussion:** Marketing and Communications - what works for Trusts? Sally Edwards, Spot On Marketing & Communications (@SpotOnCIC) and Diana Ruthven, Communications Manager, Barrow Cadbury Trust (@BarrowCadbury) at Anthony Collins solicitors (@ACSLLP) (**Attendance 10**)

### Thursday 10th September

**Seminar:** Food Poverty and the Role of Food Banks Fred Rattley, Church Urban Fund (@churchurbanfund) chaired, Patricia White, Birmingham Central Food Bank (@BirmCFoodbank) and Lynne Brayne, Telford and Wrekin Crisis Network (@TelfordSupport) spoke at Midlands Arts Centre (@mac\_Birmingham) (**Attendance 11**)

### Thursday 17th September

**Roundtable Discussion:** Supporting the use of Digital Technology in the Third Sector Pauline Roche, Managing Director, RnR Organisation (@RnRWorks) at Harborne Parish Lands Charity (**Attendance 8**)

### Thursday 12th November

**West Midlands Funding 15:** 40th Anniversary Annual Conference with Sandwell SCVO at Hawthorn House, Sandwell (**Attendance 200**)

## Key Developments & Activities



**Legal Status:** during 2015 the Executive Committee decided that, in order to further develop support to members, becoming a Charitable Incorporated Organisation offered us more opportunities than remaining unincorporated. We have therefore developed a CIO constitution. This has been agreed by the Executive Committee, shared with members and will be proposed for adoption at the March 2016 AGM.



**Outreach:** we have engaged with several different regional and sub regional networks (WM LA Funding Officers' Forum, Black Country Funding Advisors Forum, Youth Focus West Midlands (@YouthFocusWM) and West Midlands Funders Forum) where we can share and exchange intelligence and information about developments and issues in the region relevant to the work of our members.



**Communications:** we provided two e-bulletins and four newsletters during the year – the direct circulation is 67 - and we updated the website on a regular basis. Our Twitter account (@westmidsfunders) continues to be maintained by our Chair Pauline Roche (@paulineroche). We now have 404 followers (+121), we are following 227 others (+50) (including members who are also on Twitter) and we tweeted 410 times in 2015. We continue to use dedicated hashtags for our events to spread news about our work and connect with others doing similar work, eg #refugeeswelcome, and use this route to circulate information and promote members' work. We are still retweeting members' tweets as a priority, and have added this facility as a service to the membership. We welcome feedback from members about this service.



**Events:** we ran seven events throughout the year, thanks to our Executive Committee, sponsors, speakers and facilitators. Attendance ranged from a minimum of eight at one of our Roundtable Discussions to 200 at our Annual Conference. We welcome ideas for events, activities and discussion topics, as well as help with organising and funding the events programme, so if you have a contribution to make, we'd love to hear from you.

## SPECIAL THANKS

### **The Executive Committee would like to take this opportunity to thank:**

Barrow Cadbury Trust, South Birmingham Friends Institute Trust and Rubery Owen Group Community Trust for providing additional funds to take forward plans to develop the work and services of the Group to its members.

We would also like to thank Dipali Chandra, the CTWM Secretary, for her valuable and dedicated services and our colleagues on the Executive Committee for the hard work they have put into CTWM's activities and development.

### **Contact Us**

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### **Keep in Touch!**

Follow us on Twitter [@westmidfunders](https://twitter.com/westmidfunders)

Visit our website [www.ctwm.net](http://www.ctwm.net)

Send us your news and information to share: [dipali@ctwm.net](mailto:dipali@ctwm.net)

Find out more about membership [www.ctwm.net/membership](http://www.ctwm.net/membership)

**And don't forget to let your contacts know you are a member of CTWM  
– use our logo, link to our website, share our news.**

**CHARITABLE TRUSTS WEST MIDLANDS (CTWM) (@westmidfunders)** is a support network for funders, including charitable trusts and foundations, that operate in the West Midlands. We help our members to work more effectively and increase their impact on people and communities, by providing opportunities for them to share and learn from each other's experience of grant giving, explore matters of common concern and forge productive relationships that contribute to the wider benefits and overall sustainability of the region's voluntary and community sector. We also aim to provide a route for charitable trust funders to be able to engage formally with private and public funders, and their networks, to increase opportunities for co-ordination and collaboration to better meet the needs of the diverse communities in the region.