

ANNUAL REPORT 2016

**Charitable Trusts
West Midlands**



ctwm.net

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

CHAIR'S REPORT



2016 has been a busy and fruitful year, with a stimulating programme of events. We held four Roundtable Discussions, facilitated by experts in their fields, covering developing criteria and guidelines for small trusts to reduce inappropriate applications, lone working in charities, how to read and understand different charity accounts, and city regions and devolved powers – an update on the West Midlands Combined Authority. Our AGM, with Keynote Speaker Phil Street (@YSWorcsPhil) of Young Solutions in Worcestershire, prompted an interesting debate based on the very informative picture that Phil painted of children and young people's issues in the region (<http://ctwm.net/ctwm-agm-2016-and-presentation/>). We organised two briefing sessions - one on immigration, asylum and refugee resettlement and one on homelessness and housing - which brought together funders and third sector organisations in the region involved in delivering services and support and gave them an opportunity to discuss the challenges in providing that support to such vulnerable groups. An enlightening workshop, supported by ODI Birmingham (@ODIBirmingham) on Data - what can charitable trust data tell us?, was delivered by Steven Flower (@StevieFlow) for open data charity 360 Giving (@360Giving). Two seminars - one on managing investments and different management approaches and another on changes in fundraising regulations - provided some useful insights into those topics. One of our Ambassadors, Judy Dyke (@Judy at TW), hosted a members' social for us at her Birmingham law firm Tyndallwoods, which had the theme of sustainability and included speaker Simon Slater of Sustainability West Midlands (@SWMTweet) as well as a demonstration on the importance of bees and hives to environmental sustainability. Our Annual Conference, held at the Impact Hub Birmingham (@ImpactHubBrum), focused on grants, investment and blended finance – what can it achieve? with keynote speaker Seb Elsworth (@SebElsworth) from Access Foundation and an opportunity for a mix of funders and third sector organisations to explore the topic in facilitated workshops (<http://ctwm.net/grants-investments-blended-finance/>).

We are looking forward to another exciting programme of events in 2017, as well as a change of legal status and name – to WM Funders Network, which we believe will strengthen the organisation enabling it to better meet the needs of our existing members and other funders who are active in the region.

Pauline Roche

SECRETARY'S REPORT

Continued funding support from Barrow Cadbury Trust, plus additional funding from David Owen Family Trust, Friends Farm St Trust and Limoges Trust, enabled us to continue to develop the work of CTWM in 2016: we increased the range and number of events, bringing together different types of funders and third sector organisations to share knowledge, skills and information to help improve grant giving practices; we forged working relationships with other networks and forums in the region, enabling us to build the profile of CTWM and access intelligence and information about key social issues and what is being done to tackle them, which we have shared with members; and we have developed our approach to marketing and communications, keeping the website up to date, embracing social media and refreshing our marketing materials and content with the support of Sally Edwards (@SpotOnCIC), which has increased our reach and profile.

Membership

Four new trusts/foundations joined CTWM in 2016 - Edwards Trust, Stratford Upon Avon Town Trust, J&O Lloyd Trust and Thomas Dole Trust - increasing our total membership. At the end of December 2016 there were 34 Trusts, two associate organisations, two individual members and six honorary members. The total membership, based on subscriptions paid, is 68 (Trusts can nominate up to 3 members per subscription).

Dipali Chandra

Executive Committee

(at 31/12/16)

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

Peter Hughes – Regional Manager, Charity Bank - **Vice Chair**

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

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

David Owen OBE – Chair, Rubery Owen Holdings Charity

Debbie Pippard – Head of Programmes, Barrow Cadbury Trust

Kath Rees – Advisor, Hay Trust

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

Ambassadors

Judy Dyke and Robert King were our Ambassadors in 2016. They have helped us raise the profile of CTWM and gain new members and supporters. Read more about them on our website: www.ctwm.net/about-us/.



JUDY DYKE



ROBERT KING

Events Calendar 2016

Wednesday 20th January

Roundtable Discussion: Small Trusts – How to Deal with Inappropriate Applications, at Harborne Parish Lands Charity (**Attendance 12**)

Wednesday 24th February

Briefing: Update on Immigration, Asylum and Refugee Resettlement, Chaired by Debbie Pippard Barrow Cadbury Trust with input from Michael Bates Birmingham CLC, Dave Stamp ASIRT, Katherine Jones Coventry University, Sian Scholes British Red Cross and Dalvinder Panesar WM Strategic Migration Partnership, at British Red Cross Centre (**Attendance 36**)

Tuesday 22nd March

AGM and Talk: Children and Young People, given by Phil Street Young Solutions, at BBC Children in Need ([@BBCIN](#)) (**Attendance 15**)

Tuesday 19th April

Roundtable Discussion: Lone Working in Charities, at Harborne Parish Lands Charity (**Attendance 10**)

Wednesday 18th May

Workshop: Data - what can Charitable Trust data tell us? delivered by Steven Flower 360 Giving, at Innovation Birmingham ([@innobham](#)) (**Attendance 11**)

Thursday 30th June

Seminar: Managing Investments to Support your Mission, with speakers Debbie Pippard Barrow Cadbury Trust, Peter Hughes Charity Bank, Adrian Taylor Smith Williamson, at Harborne Parish Lands Charity (**Attendance 7**)

Tuesday 19th July

Roundtable Discussion: Reading Accounts - how to understand different accounts and spot fraud, facilitated by Fleur Holden Sayer Vincent, at Anthony Collins Solicitors ([@ACSLP](#)) (**Attendance 9**)

Wednesday 13th July

Briefing: Review on Homelessness and Housing in the West Midlands, from Jean Templeton St Basils and Helen Mathie Homeless Link, at SIFA Fireside ([@Sifafireside](#)) (**Attendance 20**)

Friday 9th September

Members Social: Celebrating and Promoting the Work of Trusts, hosted by Tyndallwoods Solicitors ([@Tyndallwoods](#)) (**Attendance 70**)

Tuesday 15th September

Roundtable Discussion: City Regions and Devolved Powers - update on West Midlands Combined Authority, from Sharon Palmer RAWM, at Anthony Collins Solicitors ([@ACSLP](#)) (**Attendance 8**)

Thursday 20th October

Seminar: Understanding the Changes in Fundraising Regulations, delivered by Daniel Fluskey Institute of Fundraising, at Anthony Collins Solicitors ([@ACSLP](#)) (**Attendance 25**)

Thursday 24th November

Autumn Conference: Grant, Social Investment and Blended Finance, with keynote speaker Seb Elsworth Access Foundation, at the Impact Hub ([@ImpactHubBum](#)) (**Attendance 30**)

Key Developments & Activities



Legal Status: during 2016 we started the process of becoming a Charitable Incorporated Organisation (CIO) with a change in name to WM Funders Network. The constitution for this was adopted at the March 2016 AGM. We anticipate that it will be finalised in 2017, at which point membership will be automatically transferred from CTWM to WMFN.



Outreach: we continued to take forward our development plan and have built several partnerships over the last year, with the Children and Young People's Forum in the West Midlands, West Midlands Strategic Migration Partnership, Local Authority Funding Officers Forum and the Housing and Homelessness Network in the region. We have also participated in the Birmingham Investment in Neighbourhoods and Communities Hub - a model of greater collaboration and co-operation with other types of funders interested in investing in local disadvantaged communities. Several new members, including social investors, have joined our network during the year reflecting the growing diversity of funding sources operating in the region.



Communications: we sent 129 events e-bulletins and updates, six news updates and two invitations to participate in our Members Survey during the year – the direct circulation was 68 - and we updated the website on a regular basis. Our Twitter account ([@westmidsfunders](#)) is run by our Chair Pauline Roche ([@paulineroche](#)). We now have 567 followers (+163), we are following 268 others (+41) (including members on Twitter) and we have now tweeted 1,281 times. We continue to use dedicated hashtags for our events to spread news about our work and connect with others doing similar work e.g. #refugeeswelcome, and use this route to circulate information and promote members' work.



Events: we ran 12 events throughout the year, thanks to our Executive Committee, sponsors, speakers and facilitators. Attendance ranged from a minimum of seven at one of the seminars to 70 at the members' social. 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, Friends Hall Farm Street Trust, Owen Family Trust and Limoges Trust for providing additional funds to take forward plans to develop the work and services of the Group to its members. Anthony Collins Solicitors, Harborne Parish Lands Charity and BBC Children in Need for hosting events.

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

Visit our website www.ctwm.net

Send us your news and information to share: dipali@ctwm.net

Find out more about membership 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) (@westmidsfunders) 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.