

Review of 2018



This is our fourth annual review and 2018 has been our busiest to date with the highest amount of grants made and most good causes supported. We are particularly encouraged by the new charities we have met and helped. One of our objectives is to build long term relationships and it is wonderful to get updates from charities we have helped in the past. We have also been able to make follow up grants to some charities.

Let's start with the grants we made this year. We made grants totalling £28,902 to the following organisations:

Southside based in Bath is a new charity for us. They are focused on under-privileged families who are becoming detached from society. By direct help with basic needs and reconnecting families with local services, Southside is making tangible progress but they offer so much more. Improving adult skills leading to employment is a key way out of poverty. Success has been improved by capturing the talents of people in the community to become volunteers who can more readily reach out to others in their communities. Abuse and trauma leading to depression and other mental health problems together with the physical harm that is so often part of family life is a daily challenge.



The range of issues and the growing population of people affected can only be addressed by a professional, inclusive charity such as Southside where all the staff and trustees are committed and eternally optimistic about winning through. We made a grant that provided much needed computers primarily for front line staff which has transformed how they work to the benefit of the people they are helping. The grant also covered the cost of toys and play equipment for the children

who attend the Community Hubs. The relationship with Southside is excellent and we are excited by the opportunity to work with the charity's wonderful staff led by the inspirational Penny McKissock who founded the charity over 20 years ago.

We made our second grant to Infosound based in Brighton to complete the new audio studio. Infosound is an independent registered charity that produces free information, in audio, for vision-impaired people on subjects that directly affect living with sight loss in Great Britain. They are a non-commercial, apolitical and editorially-impartial public service with the core aim to share information, knowledge, experience and opinion for the benefit of vision-impaired people. Their audio studio is the hub of their operation and without it the charity would be unable to function. The old studio was unreliable and the technology limited. The project we funded was to create a new studio with state of the art technology which would not only be reliable but expand the scope of the service. Our first grant in 2016 replaced some essential equipment but this year we were able to complete the job.



We returned to Alder Hey Children's Hospital in Liverpool and made a grant to cover the cost of a Thermocare heated cot. Alder Hey estimates that each heated cot will benefit approximately 30 neonatal patients each year. In addition, the families of these patients will also benefit through the improved care of their children.

Neonatal patients and their families will benefit through the optimal care environment that they create in:

1. Nurturing early parental bonds
2. Making the hospital experience less intimidating
3. Supporting families to make the transition from hospital to home

Our own programme of Waldorf Experience goes from strength to strength with "Afternoon Tea with Song & Music" events being held at Windermere School and St John's Academy Marlborough. This year we have used a new approach inviting more people in a café style setting



with the entertainment going on around the guests. It has proven to be very successful. The music and song from the students has been excellent and at Marlborough we continue to be supported by the Sarsen Songmen who always "bring the house down" as they say. We hope to continue the programme in 2019. It is clear that these events are thoroughly enjoyed by our guests.



We have been talking to Versus Arthritis for some months now exploring with them their research into a rare but serious conditions called idiopathic inflammatory

myopathies that cause muscle inflammation called myositis. Untreated myositis causes irreversible muscle damage. Mrs Ella Humphries, Ann Parry's mother, suffered from this disease and we were keen to make a grant supporting research into better understanding of myositis and better treatments. The stage we are supporting is focused on continuous monitoring of patients. It is led by Dr Alexander Oldroyd of Manchester University and will identify worsening disease activity. The system involves an app that people with myositis will use daily. We are funding 25 accelerometer patches, to be supplied to patients, which will collect data. This project could allow constant, remote monitoring of people with inflammation leading to quicker treatment and prevent potential muscle damage and disability. Early days but we are all hopeful that meaningful improvements in treatment will be delivered.



Homelessness in the UK is a tragedy that needs to be addressed. We are so pleased to have found Whitechapel Centre based in the city centre of Liverpool which addresses the plight of the homeless amongst a range of other support programmes to help those in poverty. They have a night shelter called Labre House which deals with up to 100 people every night. Our grant purchased individual Welcome Packs given to each rough sleeper who comes to Labre House. The packs contain essential items including sleeping bags, roll mats, underwear and toiletries. Again this is, we hope, the start of a long relationship with Whitechapel to help them in the vital work they undertake to care for and empower so many people who are effectively outside society.

Calvert Trust based in Cumbria is another new charity we have helped during the year. Their focus is to benefit people with disabilities. To enable them, together with their families and friends, to achieve their potential through experiencing the challenge of outdoor adventure in the countryside. It does so principally through the provision of specialised facilities at its centre near Keswick. Our grant purchased outdoor kit such as waterproofs and wellies for children so they are able to take part in and enjoy the many activities offered at Keswick. We will return to Calvert Trust in 2019 to look at other kit and equipment needs perhaps for disabled adults.



We also made grants from our Small Grant Pot to the following

- Blooming Blossoms in Hackney London to purchase a defibrillator for their Happy Haven Therapy Centre. This is our second grant to Blooming Blossoms.
- Sarsen Songmen, a local not-for-profit male choir who have supported many local charities, care homes and other causes for the elderly. The choir brings much joy to a range of audiences but have always entertained for many good causes without charge. They regularly perform at the Foundation's Waldorf Programme events in Marlborough.
- Cumbria Downs Syndrome Support Group based in Carlisle which helps people living in Cumbria with Down's Syndrome, and for their families and carers. This is new charity to us and we are both keen to work together to support people in the area dealing with Down's syndrome.
- Our second donation to the Conor Kerin Memorial Fund, a local Marlborough charity, in support of research into the prevention, diagnosis and cure of Strep A infections.
- BBC Children in Need, Royal British Legion, Debra, Salvation Army and Prostate Cancer UK



We are looking to build a pipeline of grant applications to ensure our budget is fully spent on great projects. Therefore we have stepped up our search for quality charities doing meaningful work that meet our criteria and objectives. During the year we have discussed grant opportunities with a number of charities which we

are hopeful will result in firm applications. We had an encouraging meeting with Genesis, a charity in Bath, dealing with homeless people. In November we visited Professor Giese at Kings College London to explore how we might help his research into Alzheimers. Brace, in Bristol, is another dementia charity that we are building a good relationship with and attended their very informative conference back in November. These developments give a flavour of our proactive approach to establishing long term relationships with great charities and good causes where there is a meeting of minds on how we can work together to support efficient and focused projects. Our half yearly "What are we up to" page on our website will keep you informed. The next update is due in March.



Now let's look at the finances. We received donations of £52,930 which were boosted by gift aid to total £66,163.

The endowment fund stands at £400,251 in investments with deposits of £20,000 and cash of £14,861 making a grand total of £435,112. Our investments have performed well with dividends of £4,930 for the year. Capital appreciation of our investments since inception stands at £93,222 with an overall return, including dividends, of £107,080 as at 31 December 2018.

Our Annual Report & Accounts for 2017-18 were filed with the Charity Commission on 27 December covering the developments we have made to deliver our strategy and key objectives. We are in a strong financial position and able to look forward with confidence. Building an Expendable Endowment fund to generate income to sustain future meaningful grant budgets is a key objective. Events across the political environment including Brexit, US president Donald Trump's approach to trade, the slowdown in the Chinese economy and EU uncertainty have all had their effect on stock markets particularly towards the end of the year. Our investments have done well although many believe that stock markets across the globe are probably over valued and some correction is likely.

We are pleased with how much has been achieved in 2018 and are fired-up to make more happen in 2019. We have embraced new charities and are actively fostering these relationships which will endure over the long term. New charities and good causes whose aims and approach harmonise with our Foundation are being sought. A pipeline is being managed and quality applications are being received.



Our financial strength enables us to look forward with confidence knowing that we have the funds to underwrite our grant budget for at least the next 20 years.

At home, in the UK, and indeed across the world there are many people deprived of their basic needs. Although our Foundation's contribution in addressing these

challenges is extremely modest we hope you will join us by playing a part, no matter how small, in "making a meaningful difference to people's lives".