

## FEATURE



# The key to unlocking dormant funds to help people in need today

**T**hese days, if you want to give money to your favourite charity, it's merely a matter of making a phone call, sending a text message or clicking on the appropriate website.

Back in Victorian and Edwardian times it wasn't as easy, not least because some of the big charities we know today simply weren't around.

So what happened, says Colin Evans, from UK Community Foundations, is that middle class individuals who wanted to be philanthropic set up their own trust funds.

"There was no welfare state and most of these were aimed at

helping the 'deserving poor'."

However, as time has gone by, he said, many of these trusts have for many reasons become dormant or ineffective.

"In some instances it may be because the trusts have lost their trustees, who have become older and unable to be involved. It might be that as interest rates have fallen they do not have access to the right sort of financial/investment experience for the capital to have an income."

It might also be because the original aims of the trust are now impossible to fulfil.

"For instance, a trust might have been set up to support orphans of the Great War, to provide petticoats for poor girls or to provide clogs for workers on the 8.30am shift at a named factory, or to provide education for boys from a particular village," explains Colin.

"A lot of trusts were simply set up to provide bread or coal.

There was even a silver dowry in Wales which would pay for the wedding of a young local couple – but the last time it was used was in 1927.

"I think the most unusual one I've come across was in Wakefield, to provide a bull which would be made available on common ground for members of the smallholders' community."

Colin, who works as a trust transfer associate, seeks out

The internet has given us cat videos, social networking and instant access to information. It has also provided a key to unlocking millions of pounds for charities. Today we look at how **SUFFOLK COMMUNITY FOUNDATION** can help liberate dormant or ineffective trusts

all these trusts and has released £52 million for community foundations around the country in the last 10 years – helped largely by "data mining" the internet.

There are about 170,000 registered trusts in the UK, many of which were established between 1850 and 1940, and he simply approaches the older ones and asks if they need help.

There's a lot of money tied up in these trusts. Colin is currently in discussion with a fund that has more than £8 million.

Sometimes, he said, it's a matter of advising how the "objects" of the trust can be widened to become more relevant, helping to find new trustees with the appropriate skills or suggesting that the trust be transferred to a local community foundation.

For example, Suffolk Community Foundation has worked with two trusts – Shrubland Foundation and the Fonnereau Road Health Foundation – which as a result have changed how they operate.

David Nicolson, personal tax manager from Ensors, said the Shrubland Foundation was originally set up in the 1930s but the role of trustees had been

passed to Emily de Saumarez and her sister, Claire Saukinsey. It was aimed at helping local people but at the time he became involved it was essentially dormant, as no grants were being made.

"I suggested to them that it might be a good idea to transfer the trust to the Suffolk Community Foundation, who could invest the capital and put the money to good use helping local charities."

As a result, in 2011 the Shrubland Foundation was transferred to the Suffolk Giving Fund, where it's used for general grant-making.

Meanwhile, thanks to the Fonnereau Road Health Foundation, a new fund was created last year, aimed at helping grassroots groups in the county. The original charity dates back to 1999 and was created following the sale of Christchurch Park Hospital to BUPA.

Foundation secretary Nick Feldman said the £2 million proceeds were then used to set up one of Suffolk's largest health charities making grants to help the people of Suffolk.

"We have helped consultants at

Ipswich Hospital buy equipment that was not being purchased by the NHS. For the first seven or eight years the bulk of the grants went to the hospital and then the hospice started to make approaches too."

As the years went by it was felt that, with fewer requests from the hospital, trustees wanted to extend its reach and help other small organisations, which could make a difference.

So an approach was made to Suffolk Community Foundation for its expertise and knowledge of working with smaller charities in the county.

"Of course, we continue to

**“Our aim is to turn what might feel like an insurmountable problem into a relevant way forward.**

**Tim Holder, Suffolk Community Foundation development director.**

support the hospital and other charities, but this means we can reach other grassroots groups too."

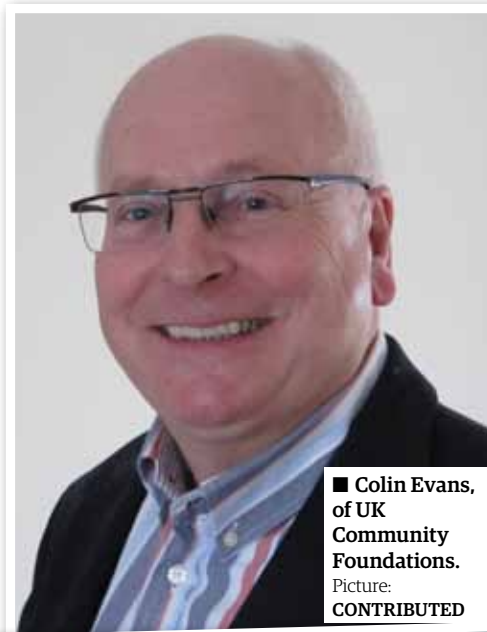
The result was a substantial donation and the creation last year of the Fonnereau Road Health Foundation Fund. Nick says the idea is to give grants for capital projects of no more than £5,000 and to fund 100% of



■ David Nicolson of Ensors

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■ Colin Evans, of UK Community Foundations.  
Picture: CONTRIBUTED



■ Home-Start, Mid Suffolk.  
Picture: CONTRIBUTED



■ A counselling room at Survivors in Transition.  
Picture: CONTRIBUTED

whatever is needed. Although it's a new fund, grants awarded include one to Survivors in Transition, an Ipswich-based charity that works with adult survivors of sexual abuse, violence and exploitation. Fiona Ellis, who runs the charity, said the £3,490 they received had been used to fit out two new

counselling rooms at their Fore Street premises. "Since the Jimmy Savile story broke, demand for our services has gone up by 250% and we are very busy. However, it's encouraging that so many people are now finding the confidence to come forward. "Last year we worked with 900

people whose sexual abuse has resulted in all sorts of problems, ranging from drug and alcohol abuse, eating disorders, self-harm and difficulties with relationships and parenting." Equipping the counselling rooms properly was a big part of their therapeutic process, she says, as it's important for people to feel

comfortable and valued when they visit. Another charity to benefit is Suffolk Accident Rescue Service, which provides specially-trained doctors and paramedics to assist East of England Ambulance Service at the scenes of serious incidents. Fundraising manager Ben Hall says: "We received £4,574, which allowed us to equip one of our lone responders with the eight pieces of specialised equipment they need, including safety clothing and helmet.

people of Suffolk is deeply rooted in our county's history. "Numerous trusts and foundations have been in existence for many generations and still pro-actively support the mission of their founding principles. Inevitably, as the needs of our society continue to evolve, some trusts find it increasingly difficult to operate in the way that was originally intended." Tim adds that the Charity Commission acknowledges that community foundations have a reputation for the effective management of charitable funds in order to maximise their impact at a local level.



■ Home-Start, Mid Suffolk. Picture: CONTRIBUTED

"Sometimes our doctors are the first person at the scene of an accident and they need monitoring equipment to check the injured person's vital signs. "We also issue them with a special drill, that's not yet available in all ambulances, that enables them to give a patient vital fluids if the doctor is unable to access a vein." Home-Start Mid Suffolk received a grant of £940 towards a projector, screen and laptop. Scheme co-ordinator Mandy Logan says it has been invaluable as their work, which promotes the safety and welfare of children and supporting families who are struggling to cope, relies a lot on volunteers. She says the equipment has helped provide initial and further specialised training to these volunteers, allowing them to go out and do their work.

"Our team has had many conversations with those who now hold the responsibility for such trusts. The burden can weigh quite heavily upon them and sometimes solutions can seem impossible to find. "With Suffolk Community Foundation's in-depth understanding of the often-hidden needs in Suffolk and a strong knowledge of the 5,000 charities and community groups who seek to meet those needs, we are very happy to share our knowledge and expertise. Our aim is to turn what might feel like an insurmountable problem into a relevant way forward that can remain fit for purpose and help those most in need for generations to come."

Tim Holder, development director at Suffolk Community Foundation, says: "The caring nature of the

More information about the work of Suffolk Community Foundation can be found at <http://suffolkcf.org.uk/>