

THE 29TH MAY 1961 CHARITABLE TRUST

ANNUAL REPORT AND FINANCIAL STATEMENTS

YEAR ENDED 5 APRIL 2017

THE 29TH MAY 1961 CHARITABLE TRUST

ANNUAL REPORT AND ACCOUNTS
Year ended 5 April 2017

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THE 29TH MAY 1961 CHARITABLE TRUST

LEGAL AND ADMINISTRATIVE INFORMATION

CONSTITUTION	:	The 29th May 1961 Charitable Trust is a charitable trust governed by its trust deed. It is a registered charity number 200198.
TRUSTEES	:	V.E. Treves C.B.E., M.A., LL.M P. Varney F.C.A. A.C. Jones F.C.A. E.C. Rantzen B.Sc, MBA
AUDITORS	:	Baldwins Audit Services Limited Churchill House 59 Lichfield Street Walsall
BANKERS	:	HSBC Trust Company (UK) Limited 2nd Floor Parkway Whiteley Fareham Hampshire
INVESTMENT CONSULTANTS	:	Cambridge Associates Limited 80, Victoria Street Cardinal Place London
MAIN INVESTMENT MANAGERS	:	BlackRock Investment Management (UK) 12 Throgmorton Avenue London J.O. Hambro Capital Management Limited Ryder Court 14 Ryder Street London Heronbridge Investment Management 24 Gay Street Bath Kiltearn Partners LLP 3 Exchange Place 3 Semple Street Edinburgh Ruffer LLP 80 Victoria Street London
SOLICITORS	:	Macfarlanes LLP 20 Cursitor Street London
CORRESPONDENT ADDRESS	:	Ryder Court 14 Ryder Street London SW1Y 6QB

THE 29TH MAY 1961 CHARITABLE TRUST

TRUSTEES' REPORT for the year ended 5 April 2017

The trustees present their Report and Financial Statements for the year ended 5 April 2017. The Financial Statements have been prepared in accordance with the accounting policies set out in the notes to the accounts and comply with the Charity's governing document, the Charities Act 2011 and Accountancy and Reporting by Charities; Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published on 16th July 2014 (FRS102).

OBJECTS OF THE CHARITY

The objects of the charity, as set out in the trust deed, are the advancement of any charitable purpose as the trustees, at their absolute discretion, think fit, by the provision of grants for such purposes and the provision of grants to benefit any charity.

STRUCTURE GOVERNANCE AND MANAGEMENT

Governing document

The trust is governed by a deed executed by the settlor, the late Miss Helen M. Martin of Kenilworth, Warwickshire on 29 May 1961.

Trustees

The trustees are experienced individuals, all with legal, financial or charity backgrounds, who have a good understanding of what is involved in being the trustee of a substantial grant-making charity.

New trustees are nominated and appointed by the existing trustees. The trustees would invite prospective new trustees to attend meetings informally to gain an understanding of the role and responsibilities of trustees. Formal training would also be provided, as necessary, to gain further understanding of the role and responsibilities of trustees.

Organisational structure

The trustees consider all grant applications. On a quarterly basis they agree final decisions on grants to be awarded. On a half yearly basis they meet to discuss the broad strategy and areas of activity of the charity including investments and reserves policies. At least annually formal meetings are held with investment consultants and investment managers. The day to day administration of the charity is outsourced.

Risk management

The trustees have assessed the major risks to which the charity is exposed, and drawn up a risk management register which they review annually. This review enables them to be satisfied that systems are in place to mitigate exposure to identified risks.

The principal risk faced by the charity lies in the performance of its quoted investments. This is mitigated by the trustees reviewing regularly the asset allocation and fund performance with its investment consultants and dividing the portfolio between five leading investment managers.

A further risk arises from fraudulent or bogus applications. This is mitigated by the due diligence process of checking the accounts of the applicant and ensuring that payments are made to UK registered charities and not to individuals.

GRANT MAKING POLICY, AIMS AND OBJECTIVES

The 29th May 1961 Charitable Trust is a general grant making trust. The policy of the trustees is to support a wide range of charitable organisations across a broad spectrum. Although for disclosure purposes grants are analysed into separate categories, the trustees are interested in funding initiatives which meet their selection criteria regardless of the charitable area into which the grant falls. Grants are made for both capital and revenue purposes. Some grants are one-off, some recurring and others spread over two or three years. The majority of grants are made to organisations within the United Kingdom and preference is given, where possible, to charities operating in the West Midlands and in particular the Coventry and Warwickshire area. The trustees do not typically fund projects outside the UK.

THE 29TH MAY 1961 CHARITABLE TRUST

TRUSTEES' REPORT for the year ended 5 April 2017

The policy of the trustees is to give careful consideration to all applications and the trustees do not discriminate on the basis of the gender, religion, race or any other protected characteristic defined in the Equality Act of 2010 of either the grant applicants or the intended beneficiaries of the grant.

The charity only makes grants to other registered charities as it considers that UK charities, established as they are for public benefit, are best placed to be partners in support of its charitable objectives. Partnering with other non-charitable organisations would require additional scrutiny and review procedures, the cost of which would reduce its charitable work.

PUBLIC BENEFIT

The charity operates for the public benefit with the large number of people helped by or otherwise benefiting from the work of the organisations to which it awards grants, being the ultimate beneficiaries of its funds.

The trustees confirm that they have referred to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, in planning future activities and in setting grant making policies.

GRANT-MAKING PROCEDURE

The trustees make decisions regarding awards in February, May, August and November of each year. It is their practice to require applicants to provide details of the organisation, the funding requirement and their latest report and accounts. Whenever it is considered necessary or advisable visits are made by Trustees in order to gain a better understanding of applicants' requirements. In view of the numbers involved and to save cost, grant applications are not acknowledged and only successful applicants are informed of the outcome of their applications.

REVIEW OF ACTIVITIES

The trustees' main aims are threefold: to continue a long term positive return on their investments in order to sustain their charitable giving; to continue to attract a wide selection of funding applications from which worthy causes can be chosen and to exercise sufficient care and diligence that the grants made are all to organisations which make proper use of the funds.

In the year ended 5 April 2017 grants were awarded to 351 (2016 - 360) organisations totalling £4,548,595 (2016 - £3,724,725).

The grants awarded, as in previous years, support a wide range of charitable activities and work across the UK, although preference is given to the West Midlands and in particular the Coventry and Warwickshire area, in accordance with the wishes of the Settlor.

Major new awards during the year include:

£1,000,000 to the University of Warwick towards the costs of redeveloping and refurbishing the Arts Centre; £75,000 to Zoe's Place towards the core costs of a hospice in Coventry supporting very young children suffering life threatening conditions; £75,000 to The Albany Theatre Trust to enable the refurbishment of the theatre; £50,000 to The Royal Albert Hall for the redevelopment of the hall; £50,000 to the Victoria and Albert museum for redeveloping part of the museum; £40,000 to Prior's Court Foundation towards the costs of a capital expansion programme at a school in Berkshire for autistic young people.

The charity continued to support substantially the following organisations amongst others:- Coventry and Warwickshire Awards Trust, Crisis, Macmillan Cancer Support, St. Basil's Centre, Abbeyfields West Midlands, Heart of England Community Foundation, NACRO, Young People First, Coventry Cyrenians, Life Path Trust, Federation of London Youth Clubs, The Connection at St. Martins, Myton Hamlet Hospice and Birmingham Settlement.

In addition numerous smaller grants were made to Charities reaching people at the margins of society in the fields of homelessness, offenders and social welfare.

Full details of grants awarded are shown in a separate report entitled Grants Awarded 2016/17 which is available at the charity's correspondent address or is accessible through the website of the Charity Commission. This list also includes an analysis by location category.

THE 29TH MAY 1961 CHARITABLE TRUST

TRUSTEES' REPORT for the year ended 5 April 2017

ACHIEVEMENTS AND PERFORMANCE

Objective 1

To produce a long-term positive return on investments

Achieved: The 5 year total return on investments continues to be satisfactory

Objective 2

To continue to attract a wide selection of funding applications from which worthy causes can be chosen.

Achieved: over 800 applications were received and over 200 new grants were made.

Objective 3

To exercise sufficient care and diligence so that grants made are all to organisations which make proper use of the funds.

Achieved: No matters have come to the trustees' attention to give cause for concern.

FINANCIAL REVIEW

Accounts

The detailed accounts of the charity are set out on pages 8 to 18.

Overall actual investment income increased by £409,525 to £3,791,323.

The income was enhanced by transfers from the Expendable Endowment Fund of £1,552,715, as a result of the investment managers operating on a total return basis and a sum of £285,690 to enable further grants to be awarded. This enabled the trustees to have available £5,629,728 (2016 – £5,174,984) from which to award grants and meet expenses.

Grants awarded amounted to £4,548,595 (2016 - £3,724,725).

The cost of raising funds decreased overall by £7,300. An increase in investment property costs arising from further refurbishment works was more than offset by a reduction in overall investment management fees. The normal costs of the latter increased due to an increase in the value of the portfolios, but the performance fee for one fund was considerably reduced.

Investment policy and performance

The trustees' powers of investment are wide and are governed by the trust deed. The trustees have delegated the management of the quoted and unquoted investments to various fund managers on a discretionary basis. The overall investment objective is to achieve an increase in the real values of the investments over the long term.

The stock market recovery during the period of the accounts is reflected in a gain in the value of the investments (excluding property) of 19%, a very satisfactory return.

Over both three and five years the portfolios have, where applicable, out-performed the benchmarks established by the asset allocation.

The trustees continue to receive significant reports and advice from their investment consultants, Cambridge Associates Limited, regarding the performance and choice of managers. These managers are not required to take any social, environmental or ethical considerations into account in their investment decisions.

At 5th April 2017, the net worth of the charity was £119,280,350 (2016 - £103,076,759).

THE 29TH MAY 1961 CHARITABLE TRUST

TRUSTEES' REPORT for the year ended 5 April 2017

KEY MANAGEMENT PERSONNEL AND REMUNERATION

The trustees are considered to be the key management personnel in charge of directing and controlling the charity. In accordance with the trust deed they each receive a fixed fee of £157.50 per annum. Details of reimbursement of trustee expenses are set out in note 8 to the financial statements. The charity has no employees.

RESERVES

The whole of the charity's endowment is expendable and thus the distinction between income and capital is not relevant. The trustees set an annual budget for grants to be awarded of approximately 4% of the two year average value of the fund. This budget is primarily derived from income, with the balance being drawn from capital. In this way it is intended that the expendable endowment fund will grow sufficiently over net grants awarded by a margin above inflation to meet the trustees' investment objectives so that the grant giving capacity of the charity will not diminish in real terms.

FUTURE PLANS

The trustees aim to at least maintain the real value of the charity's investments so as enable them to continue to support a broad spread of organisations at varying levels of grant. The trustees intend to continue making grants to worthy charities at the maximum level to which investment returns will allow, whilst minimising administrative costs within the confines of current regulation and good practice.

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts Reports) Regulations 2008 and the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on 21 November 2017 and signed on their behalf by:

P. Varney

THE 29TH MAY 1961 CHARITABLE TRUST

INDEPENDENT AUDITORS' REPORT TO THE TRUSTEES OF THE 29TH MAY 1961 CHARITABLE TRUST

We have audited the financial statements of The 29th May 1961 Charitable Trust for the year ended 5 April 2017 which comprise the Statement of Financial Activities, the Balance Sheet and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

This report is made solely to the charity's trustees, as a body, in accordance with regulations made under section 154 of the Charities Act 2011. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Respective responsibilities of trustee and auditor

As explained more fully in the Trustees' Responsibilities Statement set out on page five, the trustees are responsible for the preparation of financial statements which give a true and fair view.

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with regulations made under section 154 of that Act. Our responsibility is to audit and express an opinion on the financial statements in accordance with applicable law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's [(APB's)] Ethical Standards for Auditors.

Scope of the audit of the financial statements

An audit involves obtaining evidence about the amounts and disclosures in the financial statements sufficient to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or error. This includes an assessment of: whether the accounting policies are appropriate to the charity's circumstances and have been consistently applied and adequately disclosed; the reasonableness of significant accounting estimates made by the trustees; and the overall presentation of the financial statements. In addition, we read all the financial and non-financial information in the Trustees' Annual Report to identify material inconsistencies with the audited financial statements. If we become aware of any apparent material misstatements or inconsistencies we consider the implications for our report.

Opinion on financial statements

In our opinion the financial statements:

- give a true and fair view of the state of the charity's affairs as at 5 April 2017 and of its incoming resources and application of resources, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- have been prepared in accordance with the requirements of the Charities Act 2011.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters where the Charities Act 2011 requires us to report to you if, in our opinion:

- the information given in the Trustees' Annual Report is inconsistent in any material respect with the financial statements; or
- sufficient accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Baldwins Audit Services Limited

Statutory Auditors

Eligible to act as an auditor in terms of Section 1212 of the Companies Act 2006.

Churchill House

59 Lichfield Street

Walsall

WS4 4BX

Dated: 21 November 2017

THE 29TH MAY 1961 CHARITABLE TRUST

**STATEMENT OF FINANCIAL ACTIVITIES
for the year ended 5 April 2017**

	<u>Notes</u>	Income <u>fund</u> £	Expendable endowment <u>fund</u> £	2017 <u>Total</u> £	2016 <u>Total</u> £
INCOME FROM:					
Investment Income	2	3,791,323	-	3,791,323	3,381,798
TOTAL INCOME		<u>3,791,323</u>	<u>-</u>	<u>3,791,323</u>	<u>3,381,798</u>
EXPENDITURE ON:					
Raising Funds – Investment management costs	3	992,184	42,690	1,034,874	1,042,174
Charitable Activities: Grant Making					
Grant Expenditure	4	4,548,595	-	4,548,595	3,724,725
Grant Related Support Costs	5	88,949	-	88,949	85,810
Cost of grant making		<u>4,637,544</u>	<u>-</u>	<u>4,637,544</u>	<u>3,810,535</u>
TOTAL EXPENDITURE		<u>5,629,728</u>	<u>42,690</u>	<u>5,672,418</u>	<u>4,852,709</u>
Net gains/(losses) on investments	9	-	18,084,686	18,084,686	(8,321,735)
NET (EXPENDITURE)/INCOME		<u>(1,838,405)</u>	<u>18,041,996</u>	<u>16,203,591</u>	<u>(9,792,646)</u>
TRANSFERS BETWEEN FUNDS		1,838,405	(1,838,405)	-	-
NET MOVEMENT IN FUNDS		-	16,203,591	16,203,591	(9,792,646)
RECONCILIATION OF FUNDS					
Fund Balances 6 April 2016		-	103,076,759	103,076,759	112,869,405
Fund Balances 5 April 2017		<u>-</u>	<u>119,280,350</u>	<u>119,280,350</u>	<u>103,076,759</u>

All operations of the charity continued throughout both periods and no operations were acquired or discontinued in either period. All recognised gains and losses during the year are included within the Statement of Financial Activities. The accompanying notes form an integral part of this Statement of Financial Activities.

THE 29TH MAY 1961 CHARITABLE TRUST

**BALANCE SHEET
As at 5 April 2017**

		£	<u>2017</u>	£	£	<u>2016</u>	£
	Notes						
INVESTMENT ASSETS							
Investments	9		116,936,504			100,792,571	
Cash awaiting investment			2,536,538			2,434,189	
			<hr/>			<hr/>	
			119,473,042			103,226,760	
CURRENT ASSETS							
Debtors	10	47,654			34,055		
Bank balance		2,734,730			2,478,112		
			<hr/>			<hr/>	
			2,782,384			2,512,167	
CREDITORS: Amounts falling due within one year	11	(2,036,244)			(1,914,168)		
			<hr/>			<hr/>	
NET CURRENT ASSETS				746,140			597,999
CREDITORS: Amounts falling due after more than one year	12			(938,832)			(748,000)
NET ASSETS	13			<hr/> <hr/>			<hr/> <hr/>
				119,280,350			103,076,759
UNRESTRICTED FUNDS							
Expendable endowment fund				119,280,350			103,076,759
Income fund				-			-
				<hr/>			<hr/>
				<hr/> <hr/>			<hr/> <hr/>
				119,280,350			103,076,759

The financial statements on pages 8 to 17 were approved by the trustees on 21 November 2017 and signed on their behalf by:-

V.E. TREVES

P. VARNEY

THE 29TH MAY 1961 CHARITABLE TRUST

**STATEMENT OF CASHFLOW
for the year ended 5 April 2017**

	<u>Notes</u>	2017 <u>Total</u> £	2016 <u>Total</u> £
NET CASH FLOW FROM OPERATING ACTIVITIES	15	(5,373,109)	(5,193,738)
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CASH FLOW FROM INVESTING ACTIVITIES			
Payments to acquire investments		(6,006,172)	(25,555,270)
Receipts from sales of investments		7,946,925	10,518,541
Interest received		188,732	175,119
Dividend income		3,160,076	2,771,539
Rental income		442,515	435,140
<hr/>			
NET CASH FLOW FROM INVESTING ACTIVITIES		5,732,076	(11,654,931)
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NET INCREASE/(DECREASE) IN CASH AND CASH EQUIVALENTS		358,967	(16,848,669)
CASH AND CASH EQUIVALENTS AT 6 APRIL 2016		4,912,301	21,760,970
<hr/>			
CASH AND CASH EQUIVALENTS AT 5 APRIL 2017		<u>5,271,268</u>	<u>4,912,301</u>
<hr/>			
CASH AND CASH EQUIVALENTS CONSISTS OF:			
Cash at bank		2,734,730	2,478,112
Cash awaiting investment		2,536,538	2,434,189
<hr/>			
CASH AND CASH EQUIVALENTS AT 5 APRIL 2017		<u>5,271,268</u>	<u>4,912,301</u>

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

1. ACCOUNTING POLICIES

1.1 General information and basis of accounting

The charity constitutes a public benefit entity as defined by FRS102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) issues on 16 July 2014 (as updated through Update Bulletin 1 published on 2 February 2016), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102), the Charities Act 2011 and UK Generally Accepted Practice as it applies from 1 January 2015.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair' view. This departure has involved following the Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Fund accounting

As the trustees have the power to distribute both income and capital the funds of the trust are all unrestricted and comprise:

Expendable endowment fund

The fund comprises the original capital fund and gains thereto. The policy of the trustees is to retain capital in an endowment fund in order to generate income from which grants are made. The trustees require their investment managers to make available for distribution a fixed sum based upon the value of the portfolio. Any shortfall in actual income is made up by transferring capital from the fund to the income fund.

The fund is represented by the capital investments included in fixed assets less any appropriate creditor.

Income fund

The income fund represents investment income less expenditure and grants made, augmented by any transfer from the expendable endowment fund.

1.3 Income recognition

All incoming resources are included in the statement of financial activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

Investment income is earned through holding assets for investment purposes such as shares and property. It includes dividends, interest and rent. Interest, dividend and rent income is recognised when the charity's right to receive payment is established.

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

1. ACCOUNTING POLICIES (cont'd)

1.4 Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties and it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

1.5 Investment management fees

Annual management fees are charged against the income fund. Performance fees are charged against the expendable endowment fund.

1.6 Grants

Grants awarded are accrued in the accounts when they are approved by the trustees and as soon as the recipient has been notified, regardless of date of payment, as the charity has a constructive obligation. In exceptional circumstances grants offered subject to conditions which have not been substantially met at the year end are noted as a commitment but not accrued as expenditure.

1.7 Charitable activities

The trustees consider that grant-making is the charity's sole charitable activity.

1.8 Support costs

These comprise administration and accountancy costs. The majority of these costs support the grant-making activity and are so allocated. A small proportion of support costs is allocated to governance costs.

1.10 Governance costs

Governance costs comprise all costs involving the public accountability of the charity and its compliance with regulation and good practice. These costs include costs related to statutory audit, trustees' remuneration and expenses together with an allocation of support costs.

1.11 Fixed asset investments

Investment properties for which fair value can be measured without undue cost or effort are measured at fair value at each reporting date with changes in fair value recognised in 'net gains/(losses) on investments' in the SoFA.

Investments are recognised initially at fair value which is normally the transaction price excluding costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) on investments' in the SoFA if the shares are publicly traded or their fair value can otherwise be measured reliably.

Quoted investments are included at mid-market price at the balance sheet date. Overseas investments are translated into sterling at the rates then ruling. Unquoted investments are included at the fund manager's valuation at the balance sheet date.

1.12 Taxation

The charity carries out activities which are exempt from Corporation tax and Income tax.

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

2. INVESTMENT INCOME

	<u>U.K.</u> £	<u>Overseas</u> £	<u>2017</u> <u>Total</u> £	<u>2016</u> <u>Total</u> £
Quoted investments				
Fixed interest	171,875	-	171,875	156,887
Equity	3,001,991	158,085	3,160,076	2,771,539
Interest on cash deposits	16,857	-	16,857	18,232
Rental income	442,515	-	442,515	435,140
	<u>3,633,238</u>	<u>158,085</u>	<u>3,791,323</u>	<u>3,381,798</u>

3. INVESTMENT MANAGEMENT COSTS

	<u>Income</u> £	<u>Endowment</u> £	<u>2017</u> <u>Total</u> £	<u>2016</u> <u>Total</u> £
Investment Management fees	746,133	42,690	788,823	834,441
Investment Consultants' fee	48,000	-	48,000	45,629
Investment Property Expenditure	198,051	-	198,051	162,104
	<u>992,184</u>	<u>42,690</u>	<u>1,034,874</u>	<u>1,042,174</u>

4. GRANT EXPENDITURE

Grants approved	<u>2017</u> Number	<u>2017</u> £	<u>2016</u> Number	<u>2016</u> £
Grants approved during the year	<u>351</u>	<u>4,548,595</u>	<u>360</u>	<u>3,724,725</u>

Institutions:	<u>2017</u> Number	<u>2017</u> £	<u>2016</u> Number	<u>2016</u> £
Grants by classification				
Arts and Museums	27	1,408,800	35	511,500
Conservation and Protection	10	101,000	12	134,500
Employment, Education and Training	24	285,000	23	325,000
Homelessness and Housing	33	419,500	25	347,000
Leisure, Recreation and Youth	84	685,500	83	677,300
Medical	20	253,000	13	138,500
Offenders	18	233,500	15	277,000
Social Welfare	135	1,162,295	154	1,313,925
Grants approved during the year	<u>351</u>	<u>4,548,595</u>	<u>360</u>	<u>3,724,725</u>

No grants are made to individuals.

As the support costs are so low, any attempt to apportion them between grant classifications would be unhelpful.

Details of grants awarded during the year under review are given in a separate report titled Grants Awarded 2016/2017 which is available from the Charity's correspondent address or is accessible through the website of the Charity Commission. This list also includes an analysis by location category.

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

5. **ALLOCATION OF SUPPORT COSTS**

All support costs are allocated to the one activity of grant making.

	<u>2017</u>	<u>2016</u>
	£	£
Administration and accountancy fees	54,448	52,438
Grant distribution charges	11,012	9,777
Subscriptions	4,827	4,873
Sundries	84	49
Governance costs (see note 6)	18,578	18,673
	<u>88,949</u>	<u>85,810</u>

The trust neither employs any staff nor pays any rent, rates or other similar outgoings or overheads, the trustees being of the opinion that all necessary services are more efficiently and economically provided as and when necessary by outside service providers. Costs are apportioned as advised by these providers.

6. **GOVERNANCE COSTS**

	<u>2017</u>	<u>2016</u>
	£	£
Administration and accountancy fees	11,063	11,107
Audit fee (see note 7)	4,800	4,800
Trustees' expenses (see note 8)	2,085	2,136
Trustees' remuneration (see note 8)	630	630
	<u>18,578</u>	<u>18,673</u>

7. **AUDITOR'S REMUNERATION**

The auditor's remuneration amounts to an audit fee of £4,800 (2016: £4,800).

8. **TRUSTEES' AND KEY MANAGEMENT PERSONNEL REMUNERATION AND EXPENSES**

As provided in the Settlement Deed, each trustee receives a fixed sum of £157.50 per annum.

The trustees were reimbursed for out-of-pocket travel and subsistence expenses amounting to £2,085 (2016: £2,136). The number of trustees who received reimbursement was 4 (2016: 4).

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

9. INVESTMENT ASSETS

	Investment properties	Quoted investments	Unquoted investment	2017 Total	2016 Total
	£	£	£	£	£
Market value at 6 April 2016	5,555,000	95,095,620	141,951	100,792,571	94,077,577
Acquisitions	-	6,006,172	-	6,006,172	25,555,270
Sale proceeds	-	(7,839,088)	(107,837)	(7,946,925)	(10,518,541)
Investment gains/(losses)	-	18,091,115	(6,429)	18,084,686	(8,321,735)
Market value at 5 April 2017	<u>5,555,000</u>	<u>111,353,819</u>	<u>27,685</u>	<u>116,936,504</u>	<u>100,792,571</u>
Analysis of market at 5 April 2017		UK	Overseas	2017 Total	2016 Total
		£	£	£	£
Investment properties		5,555,000	-	5,555,000	5,555,000
Quoted investments					
Fixed interest					
Indirect		3,648,987	-	3,648,987	3,692,110
Equity					
Indirect		100,966,012	6,738,820	107,704,832	91,403,510
Unquoted investment					
Equity					
Indirect		-	27,685	27,685	141,951
		<u>110,169,999</u>	<u>6,766,505</u>	<u>116,936,504</u>	<u>100,792,571</u>

Material investments representing over 5% of the value of the total investment assets of the charity:-

	Market Value
	£
Ruffer Total Return Fund	16,520,291
BIEF UK Specialist Equity Fund	12,929,150
Kiltearn Global Equity Fund	12,571,113
Charishare Distribution Units	11,225,378
Heronbridge UK Equity Fund	10,756,433
J.O. Hambro Equity Fund	10,150,547
J.O. Hambro UK Dynamic Fund	9,782,037
J.O. Hambro UK Growth Fund	9,760,348

The investment properties were revalued at 5 April 2016 by various chartered surveyors. The methods and significant assumptions used to ascertain the fair value were the current market value of the freehold interests subject to and with the benefit of the existing leases. The trustees do not consider the overall value to have changed significantly since that time.

10. DEBTORS

	2017	2016
	£	£
Amounts falling due within one year		
Management fee rebates	6,126	5,014
Rents receivable	29,528	17,041
Prepayment	12,000	12,000
	<u>47,654</u>	<u>34,055</u>

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

11. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	<u>2017</u>	<u>2016</u>
	£	£
Grants payable (note 14)	1,789,334	1,709,300
Accruals	246,910	204,868
	2,036,244	1,914,168
	2,036,244	1,914,168

12. CREDITORS: AMOUNTS FALLING AFTER MORE THAN ONE YEAR

	<u>2017</u>	<u>2016</u>
	£	£
Grants payable (note 14)	938,832	748,000
	938,832	748,000
	938,832	748,000

13. ANALYSIS OF NET ASSETS BETWEEN THE FUNDS

	<u>Income fund</u>	<u>Expendable endowment fund</u>	<u>Total</u>
	£	£	£
Fixed asset investments	-	119,439,178	119,439,178
Other net assets/(liabilities)	-	(158,828)	(158,828)
	-	119,280,350	119,280,350
	-	119,280,350	119,280,350

14. GRANT COMMITMENT RECONCILIATION

	<u>2017</u>	<u>2016</u>
	£	£
Commitment at the start of the year		
Payable in less than one year (note 11)	1,709,300	1,850,500
Payable in more than one year (note 12)	748,000	898,000
	2,457,300	2,748,500
Grants committed during the year (note 4)	4,548,595	3,724,725
Grants paid during the year	(4,277,729)	(4,015,925)
	2,728,166	2,457,300
	2,728,166	2,457,300

THE 29TH MAY 1961 CHARITABLE TRUST

NOTES TO THE FINANCIAL STATEMENTS

Year ended 5 April 2017

15. **RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH FLOW FROM OPERATING ACTIVITIES**

	<u>2017</u>	<u>2016</u>
	£	£
Net income/(expenditure) for year	16,203,591	(9,792,646)
Dividend income	(3,160,076)	(2,771,539)
Rental income	(442,515)	(435,140)
Interest receivable	(188,732)	(175,119)
(Gains)/losses on investments	(18,084,686)	8,321,735
(Increase)/decrease in debtors	(13,599)	25,643
Increase/(decrease) in creditors	312,908	(366,672)
	<hr/>	<hr/>
Net cash flow from operating activities	<u>(5,373,109)</u>	<u>(5,193,738)</u>

16. **CONTROLLING PARTY**

The charity is controlled by its trustees.

17. **RELATED PARTY TRANSACTION**

There are no related party transactions during the year.

18. **FINANCIAL COMMITMENTS**

There were no financial commitments at the year end.

THE 29th MAY 1961 CHARITABLE TRUST

GRANTS AWARDED

YEAR ENDED

5 APRIL 2017

THE 29th MAY 1961 CHARITABLE TRUST

Trustees
V E Treves CBE, MA, LL.M
P Varney FCA
A C Jones FCA
E C Rantzen B.Sc (Hons), MBA

Correspondent Address
Ryder Court
14 Ryder Street
London
SW1Y 6QB

Introduction

The trust is governed by a deed executed by the settlor, the late Miss Helen M Martin of Kenilworth, Warwickshire on 29th May 1961 and is a registered charity, number 200198.

Objects and Policies

The trust is a general grant making trust. The policy of the trustees is to support a wide range of charitable organisations across a broad spectrum, with grants for both capital and revenue purposes. Some grants are one-off, some recurring and others spread over two or three years. The majority of grants are made to organisations within the United Kingdom and preference is given, where possible to charities operating in the West Midlands, in particular the Coventry and Warwickshire area. Although the trustees have absolute discretion as regards their grant making policy, they restrict grants to organisations which are registered with the Charity Commission and they do not make grants to individuals.

Grant Making Procedure

The trustees consider grant applications in February, May, August and November of each year and it is their practice to require applications to be accompanied by accounts. In view of the numbers involved and to save costs, grant applications are not acknowledged and unsuccessful applicants are not notified.

THE 29th MAY 1961 CHARITABLE TRUST

Grants awarded for the year ended 5th April 2017

Category	2017 - No.	2017 - Awarded	2016 - No.	2016 - Awarded
Arts and Museums	27	£1,408,800	35	£511,500
Conservation and Protection	10	£101,000	12	£134,500
Employment, Education and Training	24	£285,000	23	£325,000
Homelessness and Housing	33	£419,500	25	£347,000
Leisure, Recreation and Youth	84	£685,500	83	£677,300
Medical	20	£253,000	13	£138,500
Offenders	18	£233,500	15	£277,000
Social Welfare	135	£1,162,295	154	£1,313,925
Grand Total	351	£4,548,595	360	£3,724,725

Location	2017 - No.	2017 - Awarded	2016 - No.	2016 - Awarded
International	1	£4,000	2	£18,000
London and the South	105	£979,795	110	£1,047,825
Midlands	137	£2,457,800	145	£1,544,900
National	79	£871,500	71	£885,000
North	28	£226,500	31	£220,000
Northern Ireland	1	£9,000	1	£9,000
Grand Total	351	£4,548,595	360	£3,724,725

Details of grants awarded are provided in this report

THE 29th MAY 1961 CHARITABLE TRUST

Grants awarded	2017
Arts and Museums	
Grants £5,000 or more as detailed below:	
University of Warwick	
Towards the costs of sponsoring the Coull Quartet	£12,000
Towards the costs of the redevelopment and refurbishment of the arts centre	£1,000,000
Royal Albert Hall	
Towards the costs of the redevelopment of the building in London	£50,000
Albany Theatre Trust (The)	
Towards the costs of refurbishing the theatre in Coventry	£50,000
Victoria and Albert Museum	
Towards the costs of redeveloping part of the museum in London	£50,000
Garden Museum	
Towards the costs of refurbishing the museum in London	£30,000
Sir John Soane's Museum	
Towards the costs of restoration work at the museum in London	£20,000
National Theatre (The)	
Towards the costs of bringing their "on demand in schools" programme to the West Midlands	£20,000
Turner Contemporary	
Towards the general costs of the gallery in Margate	£15,000
Chetham's Library	
Towards the costs of refurbishing the library in Manchester	£15,000
Birmingham Museums Ltd	
Towards the costs of a new gallery delivering STEM learning for children under eight	£15,000
National Youth Orchestra (The)	
Towards the costs of supporting young musicians from the West Midlands	£15,000
Living Paintings Trust	
Towards the costs of providing "touch to see" books for the visually impaired	£15,000
Acta Community Theatre	
Towards the costs of their "who cares project" providing a free service for young carers in the Bristol area	£15,000
Hall for Cornwall Trust	
Towards the costs of refurbishing the theatre in Truro	£12,500
Orchestras for All	
Towards the costs of a "free of charge" youth orchestra	£10,000
Orchestra of the Swan	
Towards the costs of taking music to a variety of disadvantaged people in the West Midlands	£10,000
Paraorchestra (The)	
Towards the costs of enabling talented musicians with disabilities to play alongside the City of Birmingham Symphony Orchestra	£10,000

THE 29th MAY 1961 CHARITABLE TRUST

National Art Collections Fund	
Towards the costs of funding the purchase of art by institutions	£10,000
London Music Masters	
Towards the costs of taking violin teaching into London primary schools in areas of financial need	£10,000
Deafinitely Theatre	
Towards the general costs of providing theatre to the deaf or hard of hearing	£9,000
Jaide's Stage Studios	
Towards the costs of providing dance classes for disadvantaged young people in Rugby	£9,000
Burton Museum & Art Gallery	
Towards the general costs of an art gallery and museum in Bideford	£6,000
London Urban Arts	
Towards the costs of an arts outreach programme, providing workshops in various London Boroughs	£5,000
Grants below £5,000	-£4,700
Arts and Museums Total	£1,408,800

THE 29th MAY 1961 CHARITABLE TRUST

Conservation and Protection

Grants £5,000 or more as detailed below:

Cleanup UK

Towards the costs of clearing litter in deprived areas of Birmingham

£30,000

St. Paul's Cathedral Foundation

Towards the costs of repairing the stone gallery of the cathedral in London

£20,000

Fields in Trust

Towards the costs of protecting and improving parks and playing fields nationally

£15,000

Forest of Avon Trust

Towards the costs of planting and caring for woodlands in the Bristol area

£12,000

Future Trees Trust

Towards the costs of improving British broadleaved trees to increase their disease resilience

£6,000

English Heritage

Towards the costs of preserving Marble Hill House

£5,000

Living Environment Trust

Towards the running costs of a community canal boat in Coventry

£5,000

Grants below £5,000

£8,000

Conservation and Protection Total

£101,000

THE 29th MAY 1961 CHARITABLE TRUST

Employment, Education and Training

Grants £5,000 or more as detailed below:

Prior's Court Foundation	
Towards the costs of a capital expansion programme at a school in Berkshire for autistic young people	£40,000
Sutton Trust (The)	
Towards the costs of a summer school programme at Warwick University to help students from poor backgrounds to aspire to go to university	£30,000
Achievement For All	
Towards the costs of programmes supporting low achieving pupils at schools in the West Midlands	£30,000
Ruskin Mill Land Trust	
Towards the cost of developing a building in Birmingham to provide various services to the disabled	£20,000
Friends of Plas Dol y Moch	
Towards the costs of new facilities at a residential educational centre in Wales, serving deprived children from Coventry	£20,000
Reach Out Youth	
Towards the costs of providing mentoring services to deprived children at various schools in Manchester and London	£15,000
Back on Track	
Towards the costs of a centre in Manchester providing training courses and mentoring to people with troubled pasts	£15,000
Raleigh International	
Towards the costs of bursaries enabling disadvantaged young people to go on expeditions overseas	£15,000
Kenilworth Children's Centre & Nursery School	
Towards the costs of their psychotherapy programme	£15,000
Garden Classroom (The)	
Towards the costs of delivering nature engagement sessions to over forty primary schools in poor parts of North London	£12,000
Farm Inspiration Trust	
Towards the costs of providing farm work to people in Oxfordshire who have a learning disability	£12,000
Sunfield Children's Homes	
Towards the costs of extensions to a home in Stourbridge for children with learning needs	£10,000
Connectar Training & Biodiversity Charitable Trust	
Towards the costs of biodiversity training projects in the Redditch area	£9,000
Skillways	
Towards the costs of an organisation in Godalming running skills and craft workshops for disaffected teenagers	£7,500
Bardsley Work Club	
Towards the costs of assisting people into work in Coventry	£6,000
Tamar View Community Complex Ltd	
Towards the costs of building a pre-school nursery in St Budeaux, Plymouth	£5,000
Friends of Sherwood Park School	
Towards the costs of a discovery forest at a school for disabled children in Sutton, Surrey	£5,000
Coventry University	
Towards the costs of a research facility focused on Frederick Lanchester	£5,000

THE 29th MAY 1961 CHARITABLE TRUST

Quest for Learning	
Towards the costs of a literacy project for children in the Oxford area who struggle with their reading	£5,000
Grants below £5,000	£8,500
Employment, Education and Training Total	£285,000

THE 29th MAY 1961 CHARITABLE TRUST

Homelessness and Housing

Grants £5,000 or more as detailed below:

Crisis	
Towards the core costs of a national charity for homeless people	£50,000
St. Basils	
Towards the costs of providing hostel accommodation for homeless young people in Birmingham	£50,000
Extra Care Charitable Trust (The)	
Towards the costs of an enriched opportunities programme for older people with dementia living in a retirement village in Longbridge, Birmingham	£30,000
Coventry Cyrenians Ltd.	
Towards the running costs of a day centre for the homeless in Coventry	£27,000
Connection at St. Martins (The)	
Towards the running costs of providing accommodation for homeless people in London	£25,000
Marylebone Project	
Towards the costs of supporting homeless women at two centres in London	£15,000
Launchpad Reading	
Towards the costs of providing various services for the homeless in the Reading area	£15,000
Step by Step Partnership Ltd	
Towards the costs of providing accommodation to homeless young people in the Home Counties	£15,000
Crisis Centre Ministries	
Towards the costs of providing various services to rough sleepers in Bristol	£15,000
Pathways of Chesterfield Day Centre	
Towards the costs of providing various services to the homeless in Chesterfield	£15,000
Housing the Homeless Central Fund	
Towards the costs of providing small grants for the purchase of household items for the homeless nationally	£12,000
Trinity Winchester	
Towards the costs of a drop-in centre in Winchester offering services to women suffering from domestic violence and abuse	£12,000
Action Foundation	
Towards the costs of providing accommodation for asylum seekers in the Newcastle area	£12,000
Spear	
Towards the costs of a skills development programme for homeless and vulnerable people in South West London	£10,500
Shelter	
Towards the general costs of a national homelessness charity	£10,000
Glover's Trust	
Towards the costs of additional residences at an almshouse in Sutton Coldfield	£10,000
Depaul UK	
Towards the running costs of providing accommodation for homeless young people nationally	£10,000
Cheltenham Housing Aid Centre	
Towards the costs of a centre providing advice and information to people in Cheltenham who have housing difficulties	£10,000

THE 29th MAY 1961 CHARITABLE TRUST

Passage (The)	
Towards the running costs of a day centre and hostel for homeless people in Victoria, London	£10,000
Transforming Notts Together	
Towards the costs of supporting rough sleepers in Mansfield	£9,000
Skinners' Almhouse Charity	
Towards the costs of refurbishing the almshouses in Harlow and Enfield	£7,500
Churches Housing Action Team (Mid Devon) Ltd	
Towards the costs of a housing advice project serving the homeless in Mid Devon	£6,000
Hope House Essex	
Towards the costs of a homeless shelter in Braintree	£5,000
St. Mungo's Broadway	
Towards the costs of various projects for the homeless in London	£5,000
Penrose Options	
Towards the running costs of providing support and accommodation for homeless young people leaving prison	£5,000
Centrepoint	
Towards the costs of national projects for the homeless	£5,000
Providence Row	
Towards the running costs of hostels for homeless people in London	£5,000
JPK Sussex Project	
Towards the costs of a residential centre for disabled people in East Sussex	£5,000
Grants below £5,000	£13,500
Homelessness and Housing Total	£419,500

THE 29th MAY 1961 CHARITABLE TRUST

Leisure, Recreation and Youth

Grants £5,000 or more as detailed below:

Coventry & Warwickshire Award Trust	
Towards the running costs of a sports centre in Coventry providing facilities for under-privileged communities	£100,000
Warwickshire Association of Youth Clubs	
Towards the running costs of the organisation which provides services to its member groups in Warwickshire	£28,000
Federation of London Youth Clubs	
Towards the general funds of the federation, which provides services to its member groups in London	£25,000
Midland Sports Centre for the Disabled	
Towards the running costs of a sports centre in Coventry for people with disabilities	£20,000
Berkswell Scouts Group	
Towards the costs of a new scout hut in a village near Coventry	£20,000
Limes Community & Children's Centre (The)	
Towards the costs of recreational activities for young people in Waltham Forest, London	£15,000
Siblings Together	
Towards the costs of running camps and activity days that reunite young siblings living in the care system	£15,000
Resources for Autism	
Towards the costs of a play project in Birmingham for young people with autism	£15,000
Family Holiday Association	
Towards the provision of holidays for families in need	£15,000
South West Coast Path Association	
Towards the costs of a programme to encourage children to walk the coastal path	£15,000
Youth Adventure Trust	
Towards the costs of an adventure programme for disadvantaged children in Wiltshire and Swindon	£15,000
Noah's Ark Children's Venture	
Towards the costs of running a residential adventure centre near Cirencester catering for disadvantaged children	£12,000
QE2 Activity Centre	
Towards the costs of providing residential activity holidays for children with additional needs at a centre in Thame	£12,000
Pennywell Youth Project	
Towards the costs of providing a range of services for young people in an area of Sunderland	£12,000
Kentish Town City Farm	
Towards the costs of a youth programme helping disadvantaged young people from London develop their skills	£12,000
Exmoor Calvert Trust	
Towards the costs of a centre on Exmoor providing outdoor physical activities to the disabled	£12,000
Cerebral Palsy Sport	
Towards the costs of providing nationally sport and recreation facilities for children with physical disabilities	£12,000
Children's Food Trust	
Towards the costs of running cooking clubs for children in Birmingham	£12,000

THE 29th MAY 1961 CHARITABLE TRUST

Douglas Bader Foundation	
Towards the costs of supporting children suffering from amputations or other limb deficiencies	£10,000
British Blind Sport	
Towards the costs of providing sporting events for blind people in the West Midlands	£10,000
Kidz Klub Coventry	
Towards the costs of running clubs for young people in Coventry	£9,000
Rona Trust	
Towards the costs of sail training for young people	£9,000
Clear Sky Children's Foundation	
Towards the costs of giving psychological support to children in Oxfordshire who have various mental health problems	£9,000
Happy Days	
Towards the costs of providing holidays for disadvantaged children from Birmingham and Warwickshire	£9,000
SGH Trust	
Towards the cost of holidays for deprived children from Birmingham and Bristol	£9,000
Bristol Children's Help Society	
Towards the costs of providing respite and educational breaks for underprivileged children at a centre in Somerset	£9,000
Halstead Day Centre	
Towards the costs of a day centre in Braintree providing a variety of services to the elderly	£9,000
Connects and Co	
Towards the costs of running a range of services for young carers in Norfolk	£9,000
Dream Makers2	
Towards the costs of providing holidays for children with a physical or mental illness at their centre in Brixham	£9,000
Maiden City Soccer	
Towards the costs of running various activities for children in Londonderry	£9,000
KIDS	
Towards the running costs of adventure playgrounds in London	£8,000
Sutton Coldfield Y.M.C.A.	
Towards the costs of renovating their supported accommodation unit	£7,500
Outward Bound Trust	
Towards the costs of providing places on outward bound courses	£7,000
Helford River Children's Sailing Trust	
Towards the costs of providing sailing tuition to young people in Cornwall	£6,000
Police Community Clubs of Great Britain	
Towards the costs of an anti-bullying programme at four primary schools in Birmingham	£6,000
Up'N Away	
Towards the costs of a summer holiday camp for deprived children from Haringey and Hackney, London	£6,000
Childline	
Towards the costs of providing a national helpline for children and young people	£6,000

THE 29th MAY 1961 CHARITABLE TRUST

Pontllanfraith Children's Contact Centre	
Towards the costs of a children's contact centre in Merthyr Tydfil	£6,000
Guy's Gift	
Towards the costs of supporting bereaved children and young people throughout Warwickshire	£6,000
Snowball Trust	
Towards the costs of providing specialised equipment to disabled young people in Coventry	£6,000
Kids Konnect	
Towards the costs of providing holidays for disadvantaged children from the Liverpool area	£6,000
E:Merge	
Towards the costs of running a range of activities for young people in Bradford	£5,000
Country Trust	
Towards the costs of educational visits to the countryside especially for young children from inner city areas	£5,000
Willow	
Towards the costs of running special days for seriously ill young adults and their families from the West Midlands	£5,000
City of Coventry Scout County	
Towards the costs of further development of their camp site near Coventry	£5,000
Shakespeare Hospice Trust Appeal	
Towards the costs of a children's bereavement service at the hospice in Stratford upon Avon	£5,000
Pirate Castle (The)	
Towards the costs of a canal boat in London to be used by disadvantaged children	£5,000
Birmingham Boys & Girls Union	
Towards the costs of a major refurbishment of their outdoor adventure centre	£5,000
Coventry Boys and Girls Club	
Towards the core costs of the club for young people	£5,000
Willow Trust	
Towards the costs of providing canal holidays for disabled children and adults	£5,000
Stockdales	
Towards the costs of providing weekend and holiday activities for young people in Cheshire	£5,000
Farms for City Children	
Towards the provision of practical experience of agriculture and rural life to children from inner city areas	£5,000
Surf Life Saving GB	
Towards the costs of lifesaving services nationally	£5,000
Bradby Club	
Towards the core costs of the club for young people in Rugby	£5,000
Grants below £5,000	£73,000
Leisure, Recreation and Youth Total	£685,500

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Medical

Grants £5,000 or more as detailed below:

Macmillan Cancer Support	
Towards the core funding for the national cancer counselling telephone line	£50,000
Shine	
Towards the costs of supporting people in Birmingham suffering from spina bifida	£30,000
Cure Leukaemia	
Towards the costs of expanding the centre for clinical haematology in Birmingham	£30,000
Motor Neurone Disease Association	
Towards the costs of supporting people in Coventry and Warwickshire suffering from the disease	£15,000
Mind-Solihull	
Towards the costs of supporting people with mental health problems in the Solihull area	£15,000
NMC Midlands	
Towards the costs of expanding their services to people suffering with muscular dystrophy at their centre in Coventry	£15,000
BiPolar UK	
Towards the costs of a peer support service for sufferers of the disease	£15,000
British Epilepsy Association	
Towards the costs of supporting people with epilepsy in Warwickshire	£15,000
Alzheimers Society	
Towards the core costs of the national charity dealing with care and research into all forms of dementia	£10,000
Bristol Children's Hospital	
Towards the costs of providing accommodation at the hospital for the families of sick children	£10,000
Hand on Heart	
Towards the costs of providing defibrillators into schools and community organisations across the UK	£9,000
British Stammering Association	
Towards the general costs of supporting people nationally who stammer	£9,000
Coventry Hospitals Charity	
Towards the costs of redeveloping the children's A&E department	£7,500
Child Brain Injury Trust	
Towards the costs of supporting children in the West Midlands suffering brain injury	£5,000
Dorset County Hospital Charity	
Towards the costs of improvements at the cancer centre in Dorchester	£5,000

Grants below £5,000

£12,500

Medical Total

£253,000

THE 29th MAY 1961 CHARITABLE TRUST

Offenders

Grants £5,000 or more as detailed below:

St Giles Trust	
Towards the costs of training ex-offenders in a variety of skills	£30,000
NACRO	
Towards the core costs of an organisation involved with the care and resettlement of offenders	£30,000
Shannon Trust	
Towards the costs of programmes teaching prisoners to read	£22,500
Life Cycle UK	
Towards the costs of a bicycle recycling scheme at HMP Bristol	£22,500
In2Out	
Towards the costs of an organisation in Wetherby working with young people released from custody	£15,000
Kainos Community	
Towards the costs of running courses for offenders in three UK prisons	£15,000
Clean Break	
Towards the costs of a women's theatre company in North London, working with ex-offenders and women at risk of offending	£15,000
Feltham Community Chaplaincy Trust	
Towards the costs of a mentoring service to assist young offenders released from Feltham YOI and HMP Isis	£15,000
Irene Taylor Trust (The)-Music in Prisons	
Towards the costs of musical programmes with people in or on the fringes of the criminal justice system	£10,000
Prisoners Education Trust	
Towards the core costs of an organisation providing education and training opportunities for prisoners	£10,000
Music in Detention	
Towards the costs of taking participatory music into five immigration removal centres	£10,000
Prison Reform Trust	
Towards the costs of campaigning for prison reform	£10,000
Langley House Trust	
Towards the costs of a bicycle workshop in Coventry providing employment for ex-offenders	£9,000
Land Works	
Towards the costs of providing training for current and former prisoners of HMP Channings Wood	£6,000
New Bridge	
Towards the costs of assistance to prisoners both in prison and following their release	£5,000
SOVA	
Towards the costs of rehabilitation and resettlement of offenders, ex-offenders and their families	£5,000

Grants below £5,000

£3,500

Offenders Total

£233,500

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Social Welfare

Grants £5,000 or more as detailed below:

Zoe's Place	
Towards the core costs of a hospice in Coventry supporting children up to 5 years of age suffering life threatening conditions	£75,000
Heart of England Community Foundation	
Towards the core costs of the foundation	£35,000
Towards the provision of small grants in the Coventry & Warwickshire area	£5,000
Towards the provision of small grants to a variety of charities in the Coventry & Warwickshire area	£14,000
Abbeyfield Midlands (West) Region	
To providing grants to societies in the Midlands to update their sheltered accommodation	£35,000
Combat Stress	
Towards the costs of supporting veterans in the West Midlands who have mental health problems	£30,000
Rainbow Trust	
Towards the costs of supporting nationally families who have a child with a life threatening illness	£30,000
Asylum Welcome	
Towards the costs of assisting refugees and asylum seekers in the Oxford area	£30,000
Dementia UK	
Towards the costs of running their national helpline	£30,000
Birmingham Settlement	
Towards the running costs of a charity providing services for the disadvantaged in Birmingham	£25,000
Life Path Trust	
Towards the costs of caring for people with learning difficulties in Coventry	£25,000
Patients Association (The)	
Towards the costs of a national helpline supporting people who have received substandard healthcare	£22,500
Noah Enterprise	
Towards the core costs of an organisation providing a variety of services to the most disadvantaged in Bedfordshire	£22,500
Afghanistan and Central Asian Association	
Towards the costs of providing services to disadvantaged refugee and asylum seeking groups in Lewisham and South East London	£21,000
Myton Hamlet Hospice Trust	
Towards the core funding of the hospice in Warwick	£20,000
NAPAC	
Towards the costs of a national helpline assisting people abused in childhood	£15,000
Reach	
Towards the general costs of a volunteer recruitment agency	£15,000
Norton Hall Children and Family Centre	
Towards the costs of providing support to vulnerable women and children at a centre in Saltley, Birmingham	£15,000
CFAB	
Towards the costs of reuniting children from the West Midlands with their families overseas	£15,000

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British Wireless for the Blind Fund	
Towards the costs of radio sets for blind people in the West Midlands	£15,000
Mobility Trust	
Towards the costs of providing wheelchairs and scooters to severely disabled people	£15,000
Cinnamon Network	
Towards the costs of assisting churches nationally to help those people most in need within their communities	£15,000
Newcastle Dream Centre	
Towards the costs of a centre in Newcastle providing food, clothing and companionship to the poorest people in the area	£15,000
Enterprise Club for Disabled People	
Towards the core costs of a club in Coventry providing various services to its disabled members	£5,000
Towards the costs of a development officer	£10,000
Pallion Action Group	
Towards the core costs of a centre in Sunderland delivering a wide range of services to the local community	£15,000
Familycare (Nottingham)	
Towards the costs of running a range of services supporting the disadvantaged in Nottingham	£15,000
Sebastian's Action Trust	
Towards the costs of providing respite breaks to seriously ill children and their families at their centre in Hampshire	£15,000
Furniture Station (The)	
Towards the costs of providing furniture items to deprived families and individuals in the Stockport area	£15,000
Newcastle West End Foodbank	
Towards the general costs of the foodbank	£15,000
Coventry Rape & Sexual Abuse Centre Ltd	
Towards the cost of an additional counsellor	£12,000
Boaz Trust	
Towards the costs of supporting asylum seekers in Manchester	£12,000
Bishop Creighton House	
Towards the costs of a homeline project assisting older and socially isolated people in Hammersmith and Fulham, London	£12,000
Circles UK	
Towards the general costs of an organisation training and organising volunteers to assist sex offenders nationally	£12,000
Lewisham Young Women's Resource Project	
Towards the costs of providing a range of services to girls and young women in Lewisham, London	£12,000
Share Community Ltd	
Towards the general costs of a centre in Wandsworth providing various programmes for disabled people	£12,000
Castle Vale Tenants & Residents Alliance	
Towards the costs of a new community hub in Castle Vale, Birmingham	£10,000
Sandwell Young Carers	
Towards the costs of providing practical and emotional support to young carers in Sandwell, Birmingham	£10,000
Enham Trust	
Towards the costs of a social hub at a residential home for disabled people in Enham, Hampshire	£10,000

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Coventry Central Food Bank	
Towards the costs of refurbishing their premises in Coventry	£10,000
SYDNI Centre (The)	
Towards the core costs of a community centre in Leamington Spa	£10,000
Homemakers Community Recycling	
Towards the costs of an organisation in Abergavenny, diverting furniture and household goods from landfill through reuse and recycling	£10,000
Dorothy Parkes Centre	
Towards the general costs of a community centre in Smethwick, Birmingham	£9,000
Essex Respite & Care Centre	
Towards the costs of supporting people in the Chelmsford area who have mental health problems	£9,000
Cannon Street Memorial Baptist Church	
Towards the general costs of a community centre in Handsworth, Birmingham	£9,000
Narthex Sparkhill	
Towards the general costs of a centre in Sparkhill, Birmingham supporting deprived people	£9,000
Disability Law Service	
Towards the costs of providing free legal advice to the disabled nationally	£9,000
Hands on London	
Towards the costs of their annual coat collection campaign in London	£9,000
Braintree Area Foodbank	
Towards the costs of running the foodbank	£9,000
After Adoption	
Towards the costs of an adoption support organisation providing a range of services in the West Midlands	£9,000
Mercy Central	
Towards the costs of supporting disadvantaged people in the Reading area to become debt free and return to employment	£9,000
Warden's Charitable Trust	
Towards the costs of a centre in Suffolk providing a range of services to people with disabilities	£9,000
Shine West Bowling	
Towards the costs of project to encourage healthy eating in the Bradford area	£9,000
Age Concern Luton	
Towards the costs of providing various services to the aged in Luton	£9,000
Doorway	
Towards the costs of a drop-in centre in Nuneaton	£9,000
Quinborne Community Centre	
Towards the general costs of a community centre in Quinton, Birmingham	£9,000
Home from Hospital Care	
Towards the costs of providing food parcels for deprived people discharged from Birmingham hospitals	£9,000
St. Peter's Community Centre	
Towards the general costs of a community centre in Coventry	£8,000

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King's Furniture Darlington	
Towards the costs of expanding the centre in Darlington which provides furniture to disadvantaged people	£7,500
Harlow Foodbank	
Towards the costs of a foodbank in Harlow, Essex	£7,500
Fifth Trust (The)	
Towards the costs of refurbishing a day centre in Barham, Kent for adults with learning difficulties	£7,500
Gloucestershire Rape and Sexual Abuse Centre	
Towards the costs of the centre in Gloucester helping survivors of sexual violence	£6,000
Age UK Warwickshire	
Towards the general costs of supporting older people in Warwickshire	£6,000
Turntable Furniture	
Towards the costs of supplying furniture to the disadvantaged in Exeter	£6,000
Betel UK	
Towards the costs of equipment for an organisation bringing drug users in the Nuneaton area back into normal community living	£6,000
Winston's Wish	
Towards the costs of various projects assisting bereaved children in the Midlands	£6,000
Go North Devon	
Towards the costs of supporting old people in North Devon in a variety of ways	£6,000
Home-Start Erdington	
Towards the costs of supporting families facing difficult circumstances in Erdington, Birmingham	£6,000
Arches Project (The)	
Towards the costs of providing a range of services to the disadvantaged in Nottingham	£5,000
Wheelyboat Trust	
Towards the costs of purchasing wheelyboats enabling mobility impaired people to access waterborne activities	£5,000
Cheylesmore Community Centre	
Towards the costs of refurbishing a community centre in Coventry	£5,000
Coventry & District Multiple Sclerosis Society	
Towards the costs of providing assistance to people with the disease in Coventry	£5,000
Samaritans	
Towards the core costs of the national organisation	£5,000
Orpheus	
Towards the costs of a life skills kitchen at a school for disabled students in Surrey	£5,000
Barnardo's	
Towards the costs of supporting children in Birmingham who have been sexually abused	£5,000
Seeing Ear	
Towards the costs of providing free books to the visual and physically impaired	£5,000
Warwickshire & Northamptonshire Air Ambulance	
Towards the costs of providing an air ambulance facility	£5,000

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Devon Community Foundation	
Towards the core costs of the foundation	£5,000
Renewal	
Towards the costs of a new community centre in Chelmsley Wood, Birmingham	£5,000
Halas Homes	
Towards the costs of a minibus for a residential care home in Halesowen, Birmingham	£5,000
St. Paul's Community Development Trust	
Towards the costs of running a community organisation in London	£5,000
Acacia	
Towards the costs of supporting mothers with post natal depression in Sutton Coldfield	£5,000
Hope 4 Rugby	
Towards the costs of a soup kitchen in Rugby	£5,000
Independent Age	
Towards the costs of supporting disadvantaged older people in London	£5,000
Highway Church	
Towards the costs of purchasing a building in Penryn, Cornwall for the use of the community	£5,000
Grants below £5,000	£107,795
Social Welfare Total	£1,162,295
Grand Total	£4,548,595