THE 29TH MAY 1961 CHARITABLE TRUST

ANNUAL REPORT AND FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2025

ANNUAL REPORT AND ACCOUNTS
Year ended 31 March 2025

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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	:	P. Varney F.C.A. A.C. Jones F.C.A. E.C. Rantzen B.Sc, MBA C.D.Z. Martin LL.B G. R. Cox F.C.A.
AUDITORS	:	H B & O Limited Highdown House 11 Highdown Road, Leamington Spa
BANKERS	:	HSBC UK 105 Mount Pleasant Tunbridge Wells, Kent
INVESTMENT CONSULTANTS	:	Cambridge Associates Limited 62 Buckingham Gate London
MAIN INVESTMENT MANAGERS	:	BlackRock Investment Management (UK) 12 Throgmorton Avenue London J.O. Hambro Capital Management Limited Level 3, 1 St James Market London Heronbridge Investment Management 24 Gay Street London Kiltearn Partners LLP 3 Exchange Place 3 Semple Street, Edinburgh Lindsell Train Limited 5th Floor, 66 Buckingham Gate London Ruffer LLP 80 Victoria Street London Trinity Street Asset Management 1 Cavendish Place London
SOLICITORS	:	Macfarlanes LLP 20 Cursitor Street London
CORRESPONDENT ADDRESS	:	One Eastwood Harry Weston Road Binley Business Park Coventry CV3 2UB
WEBSITE ADDRESS	:	www.29may1961charity.org.uk

TRUSTEES' REPORT
for the Year ended 31 March 2025

The trustees present their Report and Financial Statements for the year ended 31 March 2025. 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 in October 2019 (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 invite prospective new trustees to attend meetings informally to gain an understanding of the role and responsibilities of trustees. Formal training is offered, as necessary, to gain further understanding of the role and responsibilities of trustees.

Organisational structure

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 seven 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 in 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 there is a particular focus on 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 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 March, June, September and December. Applications should be made online via the charity's website www.29may1961charity.org.uk . Whenever it is considered necessary or advisable, visits are made by Trustees in order to gain a better understanding of applicants' requirements.

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 are likely to make proper use of the funds.

In the year ended 31 March 2025 grants were awarded to 358 (2024 - 400) organisations totalling £5,054,600 (2024 - £5,314,800.)

The trustees have a policy of making grants to charities in the United Kingdom for projects which are also in the United Kingdom. They also endeavour to ensure that approximately half the total grant funds in any year go to organisations and projects in the West Midlands and in particular the Coventry and Warwickshire area. These objectives reflect the wishes of the Trust's settlor.

Grants of £5,054,600 (2024: £5,314,800) were awarded during the year in the ordinary course of activities. Major new awards included: £150,000 to Betel in Britain for providing accommodation in Nuneaton for families in long term recovery from substance dependency; £150,000 to The Royal National Theatre for a new 'Green Store'; £100,000 to Priory Pool Community Centre for a new community centre in Warwick; £50,000 to The Barber Institute of Fine Arts for a new learning wing at the museum in Birmingham; £50,000 to Castel Froma Neuro Care for new bedrooms at a neurological centre in Leamington Spa; £50,000 to Foxie's Future for the purchase of an activity centre in Hampshire; £45,000 to Coventry University for bursaries for STEM students; £45,000 to Toynbee Hall for providing free legal advice; £30,000 to Childhood Eye Cancer Trust to support children in the West Midlands suffering from the disease; £30,000 to City of Birmingham Symphony Orchestra towards programmes engaging young people; £30,000 to Coventry Rape and Sexual Abuse Centre for general funds; £30,000 to Grapevine Coventry and Warwickshire for supporting children with learning difficulties; £30,000 to Hill Street Youth & Community Centre for the general costs of a youth centre in Rugby; £30,000 to Pregnancy Expectations Trauma and Loss Society to support parents in the West Midlands who have experienced baby loss; £30,000 to Royal Shakespeare Theatre to support their educational work; £30,000 to Sport 4 Life to enable disadvantaged young people in the West Midlands into sport; £30,000 to West Youth Zone for running a west London youth centre.

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

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. Arts charities also benefit from grants that are particularly important given the current state of funding in the sector.

Full details of grants awarded are shown in a separate report entitled Grants Awarded 2024/25 which is available at the charity's correspondent address or is accessible through the website of the charity and that of the Charity Commission. This list also includes an analysis by location category.

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 1,450 applications were received and 270 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: The trustees have a policy of not imposing rigid or onerous reporting requirements on recipients of grants. Many of the grants that the trust makes are relatively small and to small charities whose administrative resources are limited. The trust does however encourage feedback and review the reports received. A combination of this, and the fact that a significant number of grants are made to charities that the trust has known over a long period of time, support the trustees' view that its processes are appropriate to ensure that this objective is met.

FINANCIAL REVIEW

Accounts
The detailed accounts of the charity for the year ended 31 March 2025 are set out on pages 11 to 21.

Overall actual investment income increased by £259,883 to £3,499,746.

The income was enhanced by a net transfer from the Expendable Endowment Fund of £2,541,465. This enabled the trustees to have available £6,041,211 (2024 - £6,307,930) from which to award grants and meet expenses.

Grants awarded amounted to £5,054,600 (2024 - £5,314,800).

The cost of raising funds rose by £26,977 arising mainly from an increase in investment management fees offset by a reduction in property expenditure.

Grant related support costs fell by £23,217 mainly due to there being no exceptional IT costs in the year.

TRUSTEES' REPORT
for the Year ended 31 March 2025

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 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 investment gain in the year amounted to £464,776, the majority of which was attributable to quoted investments

Over the past year to 31 March 2025, the portfolio returned +2.0%, which lagged the investable benchmark. We note that the performance of the investable benchmark continued to be driven by a handful of US mega-cap technology stocks, but we did start to see a rotation in market leadership towards the end of Q1 2025. In this environment, the trust's more contrarian global equity managers underperformed. This was partially offset by some stronger returns from the UK specialist managers, especially those focused on small cap growth companies. Over the trailing 5 year period, returns have been strong in absolute terms (+9.4% annualised) which was well ahead of UK RPI (+6.2%), but modestly behind the investable benchmark (+11.3%).

The trustees continue to receive comprehensive 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. No changes were made either to the identity of the investment managers during the year or to the balance of their portfolios. One investment property was sold during the year for a realised profit of £1,751. It is expected that the last remaining property will be sold in the coming year.

At 31 March 2025, the net worth of the charity was £129,013,260 (2024 - £131,100,228).
Recently, the trustees have been reviewing their investment policy. In principal, they have agreed to follow a passive strategy and are currently in discussions with various partners to put this into effect. Full details will be included in next year's report.

FUND RAISING STANDARDS INFORMATION
The charity does not contract with a third party or engage in any fundraising activities.

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 in order 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.

TRUSTEES' REPORT
for the Year ended 31 March 2025

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 2019 (FRS102);
- 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 23 October 2025 and signed on their behalf by:

P. Varney

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

Opinion

We have audited the financial statements of The 29th May 1961 Charitable Trust for the year ended 31 March 2025 which comprise the Statement of Financial Activities, the Balance Sheet, Statement of Cashflow and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charity's affairs as at 31 March 2025, 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; and
- have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

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

Matters on which we are required to report by exception
We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion:

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

Responsibilities of trustees
As explained more fully in the statement of trustees' responsibilities, the trustees, who are also the directors of the charity for the purpose of company law, are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements
We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities including fraud are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness;
- Reviewing minutes of meetings of those charged with governance; and
- Enquiry of management to identify any instances of non-compliance with laws and regulations.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: http://www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

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

Use of our report

This report is made solely to the charity's trustees, as a body, in accordance with part 4 of the Charities (Accounts and Reports) Regulations 2008. 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 auditors' 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.

H B & O Limited
Highdown House
11 Highdown Road
Leamington Spa
CV31 1XT

Dated: 24 October 2025

H B & O Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under of section 1212 of the Companies Act 2006.

THE 29TH MAY 1961 CHARITABLE TRUST

STATEMENT OF FINANCIAL ACTIVITIES
for the Year ended 31 March 2025

	Notes	Income fund £	Expendable endowment fund £	2025 Total £	2024 Total £
INCOME FROM:					
Investment Income	2	3,499,746	-	3,499,746	3,239,863
Other income – conversion of endowment		2,541,465	(2,541,465)	-	-
TOTAL INCOME		6,041,211	(2,541,465)	3,499,746	3,239,863
EXPENDITURE ON:					
Raising Funds – Investment management costs	3	889,107	10,279	899,386	872,409
Charitable Activities: Grant Making					
Grant Expenditure	4	5,054,600	-	5,054,600	5,314,800
Grant Related Support Costs	5	97,504	-	97,504	120,721
Cost of grant making		5,152,104	-	5,152,104	5,435,521
TOTAL EXPENDITURE		6,041,211	10,279	6,051,490	6,307,930
Net gains on investments	9	-	464,776	464,776	7,200,089
NET INCOME/(EXPENDITURE)		-	(2,086,968)	(2,086,968)	4,132,022
RECONCILIATION OF FUNDS					
Fund Balances 1 April 2024		-	131,100,228	131,100,228	126,968,206
Fund Balances 31 March 2025		-	129,013,260	129,013,260	131,100,228

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 period 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 31 March 2025

	Notes	2025 £	2025 £	2024 £	2024 £
INVESTMENT ASSETS					
Investments	9		119,761,739		124,950,583
Cash awaiting investment			9,260,571		6,147,965
			129,022,310		131,098,548
CURRENT ASSETS					
Debtors	10	23,428		22,986	
Bank balance		2,734,033		2,784,611	
		2,757,461		2,807,597	
CREDITORS: Amounts falling due within one year	11	(2,052,011)		(1,988,917)	
NET CURRENT ASSETS			705,450		818,680
CREDITORS: Amounts falling due after more than one year	12		(714,500)		(817,000)
NET ASSETS	13		129,013,260		131,100,228
UNRESTRICTED FUNDS					
Expendable endowment fund			129,013,260		131,100,228
Income fund			-		-
			129,013,260		131,100,228

The financial statements on pages 11 to 21 were approved by the trustees on 23 October 2025 and signed on their behalf by:-

A. C. JONES

P. VARNEY

THE 29TH MAY 1961 CHARITABLE TRUST

STATEMENT OF CASHFLOW
for the Year ended 31 March 2025

	Notes	2025 Total £	2024 Total £
NET CASH FLOW FROM OPERATING ACTIVITIES	15	(6,091,338)	(6,088,782)
CASH FLOW FROM INVESTING ACTIVITIES			
Payments to acquire investments		(16,839,778)	(43,765,575)
Receipts from sales of investments		22,493,398	45,988,698
Interest received		731,956	370,140
Dividend income		2,737,992	2,811,397
Rental income		29,798	58,326
NET CASH FLOW FROM INVESTING ACTIVITIES		9,153,366	5,462,986
NET INCREASE / (DECREASE) IN CASH AND CASH EQUIVALENTS		3,062,028	(625,796)
CASH AND CASH EQUIVALENTS AT 1 APRIL 2024		8,932,576	9,558,372
CASH AND CASH EQUIVALENTS AT 31 MARCH 2025		11,994,604	8,932,576
CASH AND CASH EQUIVALENTS CONSISTS OF:			
Cash at bank		2,734,033	2,784,611
Cash awaiting investment		9,260,571	6,147,965
CASH AND CASH EQUIVALENTS AT 31 MARCH 2025		11,994,604	8,932,576

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 issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102), the Charities Act 2011 and UK Generally Accepted Accounting Practice.

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 issued in October 2019 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 plus appropriate debtors less any appropriate creditors.

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.

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.

1.9 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.

1.10 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 market price at the balance sheet date. Overseas investments are translated into sterling at the rates then ruling.

1.11 Taxation

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

1.12 Cash and cash equivalents

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity of six months or less from the date of acquisition or opening of the deposit or similar account.

2. INVESTMENT INCOME

	U.K. £	Overseas £	2025 Total £	2024 Total £
Quoted investments				
Fixed interest	14,132	242,310	256,442	207,757
Equity	2,187,646	550,346	2,737,992	2,811,397
Interest on cash deposits	475,514	-	475,514	162,383
Rental income	29,798	-	29,798	58,326
	2,707,090	792,656	3,499,746	3,239,863

3. INVESTMENT MANAGEMENT COSTS

	Income £	Endowment £	2025 Total £	2024 Total £
Investment Management fees	826,970	10,279	837,249	799,884
Investment Consultants' fee	53,870	-	53,870	52,301
Investment Property Expenditure	8,267	-	8,267	20,224
	889,107	10,279	899,386	872,409

4. GRANT EXPENDITURE

Grants approved	2025 Number	2025 £	2024 Number	2024 £
Grants approved during the year	358	5,054,600	400	5,314,800

Institutions:	2025 Number	2025 £	2024 Number	2024 £
Grants by classification				
Arts and Museums	41	1,061,600	43	852,000
Conservation and Protection	7	51,500	10	119,500
Employment, Education and Training	38	405,500	57	727,000
Homelessness and Housing	34	614,500	44	630,500
Leisure, Recreation and Youth	73	912,500	76	820,500
Medical	9	217,500	14	280,500
Offenders	31	372,000	21	280,500
Social Welfare	125	1,419,500	135	1,604,300
Grants approved during the year	358	5,054,600	400	5,314,800

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 2024/25 which is available from the Charity's correspondent address, its own website or through the website of the Charity Commission. This list also includes an analysis by location category.

5. ALLOCATION OF SUPPORT COSTS

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

	2025	2024
	£	£
Administration and accountancy fees	58,028	50,976
Grant distribution charges	8,272	8,140
Subscriptions	7,399	6,694
Sundries	-	231
Grant system IT costs	1,183	33,894
Governance costs (see note 6)	22,622	20,786
	97,504	120,721

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

	2025	2024
	£	£
Administration and accountancy fees	12,527	11,744
Audit fee (see note 7)	6,900	6,300
Trustees' expenses (see note 8)	2,407	1,954
Trustees' remuneration (see note 8)	788	788
	22,622	20,786

7. AUDITOR'S REMUNERATION

The auditor's remuneration amounts to an audit fee of £6,900 (2024: £6,300).

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 £2,407 (2024: £1,954). The number of trustees who received reimbursement was 5 (2024: 3).

9. INVESTMENT ASSETS

	Investment properties	Quoted investments	2025 Total	2024 Total
	£	£	£	£
Market value at 1 April 2024	1,209,600	123,740,983	124,950,583	119,973,617
Acquisitions	-	16,839,778	16,839,778	43,765,575
Sale proceeds	(1,019,351)	(21,474,047)	(22,493,398)	(45,988,698)
Investment gains	1,751	463,025	464,776	7,200,089
Market value at 31 March 2025	192,000	119,569,739	119,761,739	124,950,583

Analysis of market value at 31 March 2025

	UK	Overseas	2025 Total	2024 Total
	£	£	£	£
Investment properties	192,000	-	192,000	1,209,600
Quoted investments				
Fixed interest				
Direct	37,654	-	37,654	38,694
Indirect	27,046	4,450,621	4,477,667	7,476,208
Equity				
Direct	39,411	471,157	510,568	862,683
Indirect	86,599,040	27,944,810	114,543,850	115,363,398
	86,895,151	32,866,588	119,761,739	124,950,583

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

	Market Value
	£
Ruffer Total Return Fund	19,855,681
Kiltearn Global Equity Fund	13,090,295
Trinity Street Global Equity Fund	12,729,513
Heronbridge UK Equity Fund	11,228,716
J.O. Hambro UK Growth Fund	10,923,310
Lindsell Train Global Equity Fund	10,263,548
BIEF UK Specialist Equity Fund	7,758,586

The investment properties were revalued at 5 April 2021 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 consider the current overall value to be £192,000.

10. DEBTORS

	2025	2024
Amounts falling due within one year	£	£
Rents receivable	4,566	-
Prepayments	18,862	22,986
	23,428	22,986

11. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2025	2024
	£	£
Grants payable (note 14)	1,953,000	1,831,500
Accruals	99,011	157,417
	2,052,011	1,988,917

12. CREDITORS: AMOUNTS FALLING DUE AFTER MORE THAN ONE YEAR

	2025	2024
	£	£
Grants payable (note 14)	714,500	817,000

13. ANALYSIS OF NET ASSETS BETWEEN THE FUNDS

	2025	2024
	£	£
Fixed asset investments	129,022,310	131,098,548
Other net (liabilities) / assets	(9,050)	1,680
	129,013,260	131,100,228

The net assets relate solely to the expendable endowment fund.

14. GRANT COMMITMENT RECONCILIATION

	2025	2024
	£	£
Commitment at the start of the year		
Payable in less than one year (note 11)	1,831,500	1,666,000
Payable in more than one year (note 12)	817,000	749,500
	2,648,500	2,415,500
Grants committed during the year (note 4)	5,054,600	5,314,800
Grants paid during the year	(5,035,600)	(5,081,800)
Commitment at the end of the year		
Payable in less than one year (note 11)	1,953,000	1,831,500
Payable in more than one year (note 12)	714,500	817,000
	2,667,500	2,648,500

15. RECONCILIATION OF NET INCOME TO NET CASH FLOW FROM OPERATING ACTIVITIES

	2025	2024
	£	£
Net (expenditure) / income for year	(2,086,968)	4,132,022
Dividend income	(2,737,992)	(2,811,397)
Rental income	(29,798)	(58,326)
Interest receivable	(731,956)	(370,140)
(Gains) on investments	(464,776)	(7,200,089)
(Decrease) / Increase in debtors	(442)	23,185
(Decrease) / Increase in creditors	(39,406)	195,963
Net cash flow from operating activities	(6,091,338)	(6,088,782)

16. OPERATING LEASES – LESSOR

The charity leases out an investment property under a non-cancellable operating lease for the following future minimum lease payments. There are no contingent rents:

	2025	2024
	£	£
Within one year	4,438	17,750
Between two and five years	-	4,438
	4,438	22,188

17. CONTROLLING PARTY

The charity is controlled by its trustees.

18. RELATED PARTY TRANSACTION

G.R. Cox, trustee, is a partner of Dafferns LLP. Dafferns LLP provided administrative, IT and accountancy services to the charity in the year totalling £77,755 (2024: £84,320).

19. FINANCIAL COMMITMENTS

There were no financial commitments at the year end.

20. STATEMENT OF FINANCIAL ACTIVITIES FOR THE PERIOD ENDED 31st MARCH 2024

	Notes	Income fund £	Expendable endowment fund £	2024 Total £	2023 Total £
INCOME FROM:					
Investment Income	2	3,239,863	-	3,239,863	3,281,648
Other income – conversion of endowment		3,068,067	(3,068,067)	-	-
TOTAL INCOME		6,307,930	(3,068,067)	3,239,863	3,281,648
EXPENDITURE ON:					
Raising Funds – Investment management costs	3	872,409	-	872,409	936,066
Charitable Activities: Grant Making					
Grant Expenditure	4	5,314,800	-	5,314,800	4,320,950
Grant Related Support Costs	5	120,721	-	120,721	80,710
Cost of grant making		5,435,521	-	5,435,521	4,401,660
TOTAL EXPENDITURE		6,307,930	-	6,307,930	5,337,726
Net gains / (losses) on investments	9	-	7,200,089	7,200,089	(2,009,163)
NET INCOME/(EXPENDITURE)		-	4,132,022	4,132,022	(4,065,241)
RECONCILIATION OF FUNDS					
Fund Balances 6 April 2023		-	126,968,206	126,968,206	131,033,447
Fund Balances 31 March 2024		-	131,100,228	131,100,228	126,968,206

THE 29th MAY 1961 CHARITABLE TRUST

GRANTS AWARDED

PERIOD ENDED

31 March 2025

THE 29th MAY 1961 CHARITABLE TRUST

Trustees

P Varney FCA
A C Jones FCA
E C Rantzen MBA
C D Z Martin LL.B
G R Cox FCA

Correspondent Address

One Eastwood
Harry Weston Road
Binley Business Park
Coventry
CV3 2UB

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 trustees have a policy of making grants to charities in the United Kingdom for projects which are also in the United Kingdom. They also endeavour to ensure that approximately half the total grant funds in any year go to organisations and projects in the West Midlands and in particular the Coventry and Warwickshire area.These objectives reflect the wishes of the trust's settlor. 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 make decisions regarding awards in March, June, September and December. Applications should be made online via the charity's website www.29may1961charity.org.uk. Whenever it is considered necessary or advisable, visits are made by trustees in order to gain a better understanding of applicants' requirements.

THE 29th MAY 1961 CHARITABLE TRUST

Grants awarded for the period ended 31st March 2025

Sector	2025- No.	2025 - Awarded	2024- No.	2024 - Awarded
Arts and Museums	41	£1,061,600	43	£852,000
Conservation and Protection	7	£51,500	10	£119,500
Employment, Education and Training	38	£405,500	57	£727,000
Homelessness and Housing	34	£614,500	44	£630,500
Leisure, Recreation and Youth	73	£912,500	76	£820,500
Medical	9	£217,500	14	£280,500
Offenders	31	£372,000	21	£280,500
Social Welfare	125	£1,419,500	135	£1,604,300
Grand Total	**358**	**£5,054,600**	**400**	**£5,314,800**

Location	2025- No.	2025 - Awarded	2024- No.	2024 - Awarded
London and the South	105	£1,118,000	121	£1,289,000
Midlands	153	£2,685,500	179	£2,837,800
National	59	£790,100	68	£867,000
North	39	£421,000	31	£311,000
Northern Ireland	2	£40,000	1	£10,000
Grand Total	**358**	**£5,054,600**	**400**	**£5,314,800**

Details of grants awarded are provided in this report

Grants Awarded	2025
Arts and Museums	
University of Warwick	
Towards the general costs of the Arts Centre	£300,000
Royal National Theatre	
Towards the costs of a new green store	£150,000
Albany Theatre Trust (The)	
Towards the costs of refurbishing the theatre in Coventry	£100,000
Barber Institute of Fine Arts (The)	
Towards the costs of a new learning wing at the museum in Birmingham	£50,000
City of Birmingham Symphony Orchestra	
Towards the costs of an electric van for their academy	£30,000
North Music Trust	
Towards the costs of refurbishing the music centre in Gateshead	£25,000
Jazzlife Alliance 2024 Ltd	
Towards the costs of jazz improvisation programmes for young musicians in Northern Ireland	£25,000
Opera Holland Park	
Towards the costs of a schools programme for children in the Kensington area of London	£22,500
EGO Performance Company Ltd	
Towards the core costs of an arts charity in Coventry	£21,000
Public Catalogue Foundation (The)	
Towards the costs of digitalising and placing online the UK's public art collections	£20,000
Orchestra of the Age of Enlightenment	
Towards the costs of a community orchestra based at a school in North East London	£20,000
National Art Collections Fund (The)	
Towards the costs of funding the purchase of art by institutions	£20,000
Tullie House Museum and Art Gallery Trust	
Towards the costs of a new learning studio and gallery at the museum In Carlisle	£20,000
Hepworth Wakefield(The)	
Towards the costs of creative workshops for young people in Wakefield, who are not in education, employment or training.	£15,000
English Touring Opera Limited	
Towards the production costs for their Autumn 2024 touring season.	£15,000
Unity Theatre	
Towards the costs of a community project providing a creative programme for refugees in Liverpool.	£15,000
Nucleo Project (The)	
Towards free instrumental music education, benefitting young people in West London.	£15,000
British Youth Opera	
Towards the costs of training 26 young professionals to take part in their London summer showcase	£15,000
National Opera Studio	
Towards the costs of specialist coaching for talented opera singers	£15,000
Bournemouth Symphony Orchestra	
Towards the costs of their new artistic programme	£15,000
Marlowe Trust (The)	
Towards the costs of delivering learning and participation programmes to schools in Canterbury	£15,000
Longborough Festival Opera	
Towards the costs of delivering an interactive opera education programme to local schools in Gloucestershire	£15,000
Royal Court Liverpool Trust	
Towards the costs of free theatre tours & engagement activities for primary school children in Liverpool	£12,000
Holburne Museum (The)	
Towards the costs of new galleries and display areas in the museum in Bath	£10,000
Ironbridge Gorge Museum Trust (The)	
Towards the costs of repairing their winding engine exhibit	£10,000
British Glass Foundation	
Towards the costs of improving the car park at Stourbridge Glass Museum	£10,000
Horniman Museum and Gardens	
Towards the costs of a major capital project at the museum in London	£10,000

Wiltshire Music Centre Trust	
Towards the costs of their current artistic programme, creative learning projects , and talent development	£9,000
Tara Arts Group Ltd	
Towards the costs of training and giving professional opportunities to young artists from the South Asian community	£9,000
Royal Philharmonic Society	
Towards the costs of instrument purchase grants for talented young musicians with low incomes	£9,000
Cockpit Arts	
Towards the costs of providing youth education in crafts at a learning centre in Deptford	£9,000
Anjali Dance Company	
Towards the costs of providing dance tuition, workshops and performance opportunities to people with learning difficulties	£6,000
Curwen Print Study Centre Ltd	
Towards the costs of building repairs to the printmaking centre in Haverhill	£5,000
St. George's Bristol	
Towards the costs of a free ticket scheme to attend concerts at a venue in Bristol	£5,000
Half Moon Young People's Theatre	
Towards the costs of upgrading the fire protection system at the theatre in London	£5,000
Royal Society of Sculptors	
Towards the costs of a new learning space at their building in London	£5,000
Chichester Marks Holocaust Memorial Day	
Towards the cost of staging the opera, The Last Train to Tomorrow, at The Minerva Theatre in Chichester	£5,000
Grants below £5,000	£4,100
Arts and Museums Total	**£1,061,600**

Conservation and Protection	
Commonwealth War Graves Foundation	
To support a volunteer programme that cares for war graves in the Midlands	£15,000
Horatio's Garden	
Towards the costs of maintaining the gardens at a spinal injury centre in Oswestry	£15,000
Arkwright Society (The)	
Towards the core costs of the history museum in Matlock	£10,000
Grants below £5,000	£11,500
Conservation and Protection Total	**£51,500**

Employment, Education and Training	
Coventry University	
Towards the costs of providing bursaries for engineering, environment and science students	£45,000
Royal Shakespeare Company	
Towards the costs of supporting the development of new associate school partnership clusters in Coventry	£30,000
Royal Botanic Gardens, Kew	
Towards the costs of the carbon garden	£25,000
Breaking Barriers	
Towards the costs of unlocking employment opportunities for refugees across the West Midlands	£21,000
Blind in Business Trust	
Towards the costs of supporting blind and sight impaired young people in Coventry and Warwickshire	£21,000
Economist Educational Foundation (The)	
Towards the costs of supporting children in the UK to join high-quality discussions about the news	£18,000
Future First Alumni Ltd	
Towards the costs of inspiring students' post-16 choices in four schools in Coventry and Warwickshire	£15,000
Overcoming MS	
Towards the costs of of helping people with MS nationally	£15,000
Back on Track Manchester	
Towards the costs of providing learning to adults facing multiple social disadvantage in Manchester	£15,000
Central Africa Refugee Link	
Towards the costs of supporting BME young people with mental health problems in the West Midlands	£15,000
Doorstep Library Network	
Towards the costs of a reading project for under 11s in a housing estate in West London	£15,000
Stepney Bank Stables	
Towards the costs of supporting disadvantaged young people to increase their educational and employability prospects In Newcastle upon Tyne	£10,000
MYTIME Young Carers	
Towards the costs of of supporting young carers nationally	£10,000
Treloar Trust	
Towards the costs of an electric bus for an outdoor learning centre in Hampshire for young people who have complex visual disabilities	£10,000
Strength & Stem Ltd	
Towards the costs of a skills development programme in floristry increasing the employability of women survivors of exploitation in London	£9,000
Second Chance Children's Charity	
Towards the costs of a scheme to integrate non-attendee children back into full time education	£9,000
My Life My Choice	
Toward the core costs of an organisation supporting people with learning difficulties in Oxfordshire	£9,000
Beyond Food Foundation	
Towards the costs of delivering kitchen based skills workshops to support people into employment in London	£9,000
Spring Playgroup and Preschool (The)	
Towards the costs of free places for disadvantaged children at a nursery in Kenilworth	£9,000
Bramber Bakehouse	
Towards the costs of support, training and mentoring for women who have experienced abuse, exploitation & displacement in Sussex	£9,000
Seashell Trust	
Towards the costs of providing specialist education and care to young people with learning difficulties at a school in Cheadle	£9,000
Show Racism the Red Card	
Towards the costs of expanding their anti-racism schools' programmes in the West Midlands	£7,500
Governors for Schools	
Towards the costs of an outreach programme inspiring young people to become school governors	£7,500
St. Paul's Church of England Primary School	
Towards the costs of a new learning space at a school in Leamington Spa	£7,000
Magic Lantern	
Towards the costs of providing history of art and visual learning workshops in state primary schools nationally	£6,000

Waterperry Opera Festival	
Towards the costs of a young artist programme bringing opera to disadvantaged groups nationally	£6,000
Bristol Music Trust	
Towards the costs of providing a programme of extra-curricular music activities for children and young people in Bristol	£5,000
Book Aid International	
Towards the costs of providing books to the world's disadvantaged communities	£5,000
Spadework Ltd	
Towards the costs of providing a variety of activities for vulnerable adults with learning difficulties in North West Kent	£5,000
Abbey School (Farnham) Trust (The)	
Towards the costs of a wheelchair accessible minibus for the school in Farnham	£5,000
Grants below £5,000	£23,500
Employment, Education and Training Total	**£405,500**

Homelessness and Housing	
Betel Of Britain	
Towards the costs of building accommodation in Nuneaton for families in long-term recovery from substance dependency	£150,000
St. Basils	
Towards the costs of providing hostel accommodation for homeless young people in Birmingham	£65,000
Crisis	
Towards the core costs of a national charity for homeless people	£50,000
Coventry Cyrenians Ltd.	
Towards the costs of providing a range of accommodation and support to homeless people in Coventry and Warwickshire	£30,000
Connection at St. Martin's (The)	
Towards the running costs of providing accommodation for homeless people in London	£25,000
Direct Help & Advice	
Towards the costs of outreach services in Nottinghamshire to provide debt and housing advice	£20,000
Step by Step Partnership Ltd	
Towards the costs of providing accommodation to homeless young people in the Home Counties	£15,000
Bristol Refugee Rights	
Towards the costs of helping people seeking asylum in Bristol to secure safe and adequate housing	£15,000
Grub and Gab Club (The)	
Towards the costs of providing food for homeless people in Coventry over Christmas	£15,000
Shelter	
Towards the general costs of a national homelessness charity	£15,000
Depaul UK	
Towards the running costs of providing accommodation for homeless young people nationally	£15,000
Daylight Centre Fellowship	
Towards the core costs of a community hub in Wellingborough supporting those impacted by homelessness and poverty.	£15,000
Emmaus Bolton	
Towards the costs of new roofs for their buildings	£15,000
Ipswich Housing Action Group	
Towards the costs of advocacy services for homeless people in Ipswich	£12,000
Homes of Hope	
Towards the core costs of a residence programme for homeless men in Manchester	£10,000
St. Anne's Hostel	
Towards the costs of fire door replacements at the hostel in Birmingham	£10,000
Passage (The)	
Towards the running costs of a day centre and hostel for homeless people in Victoria, London	£10,000
St. Mungo's Broadway	
Towards the costs of various projects for homeless people in London	£10,000
Embassy	
Towards the costs of building forty new homes for homeless men across Greater Manchester	£10,000
SIFA Fireside	
Towards the costs of supporting homeless people in Birmingham in a variety of ways	£10,000
Emmaus South Wales	
Towards the costs of expanding their community operations to support homeless people in South Wales	£10,000
Coram Voice	
Towards the costs of a homeless outreach advocacy service for vulnerable young people nationally	£9,000
Citizens Advice North and West Kent	
Towards the costs of their homelessness prevention project	£9,000
Rising Sun Domestic Violence and Abuse Service	
Towards the costs of providing specialist supported accommodation to young women in the East Kent area who have been impacted by domestic abuse	£9,000
Kennet Furniture Refurbiz Ltd	
Toward the costs of crisis provisioning for people experiencing homelessness in Wiltshire	£9,000
Caring in Bristol	
Towards the costs of supporting young people in Bristol at risk of homelessness	£7,500
Providence Row	
Towards the running costs of hostels for homeless people in London	£6,000

Hope 4 Rugby	
Towards the costs of supporting homeless people in Rugby in a variety of ways	£6,000
Whitehaven Community Trust Ltd	
Towards the costs of of teaching cooking skills to vulnerable young people in Whitehaven	£6,000
Centrepoint	
Towards the costs of national projects for homeless people	£6,000
Central & Cecil Housing Trust	
Towards the costs of a hostel for homeless women in London	£5,000
Dudley Lodge	
Towards the costs of supporting disadvantaged families in Coventry	£5,000
Penrose Options	
Towards the running costs of providing support and accommodation for homeless young people leaving prison	£5,000
New Horizon Youth Centre Ltd.	
Towards the costs of a centre in London supporting young homeless people	£5,000
Homelessness and Housing Total	**£614,500**

Leisure, Recreation and Youth

Coventry & Warwickshire Award Trust	
Towards the running costs of sports centres in Coventry providing facilities for under-privileged communities	£100,000
Foxie's Future	
Towards the costs of securing the future of Foxlease as an activity centre for youth and community groups in Hampshire	£50,000
Sport 4 Life	
Towards the costs of supporting disadvantaged young people through sport related projects in the West Midlands	£30,000
Hill Street Youth and Community Centre	
Towards the core costs of a youth centre in Rugby	£30,000
West Youth Zone	
Towards the costs of a West London youth centre	£30,000
Grapevine Coventry and Warwickshire	
Towards the costs of supporting children and young adults in Coventry and Warwickshire who have learning difficulties	£30,000
Young People First (Midlands)	
Towards the running costs of an organisation which supports disadvantaged young people in Warwickshire	£28,000
City of Coventry Scout County	
Towards the costs of further development of their camp site near Coventry	£25,000
Federation of London Youth Clubs	
Towards the general funds of the Federation, which provides services to its member groups in London	£25,000
Artichoke Trust	
Towards the costs of a culture-led regeneration programme for Nuneaton and Bedworth	£25,000
Square Peg Activities Limited	
Towards the costs of supporting disabled children in Sutton Coldfield in a variety of ways	£21,000
Midland Sports Centre for the Disabled	
Towards the running costs of a sports centre in Coventry for people with disabilities	£20,000
Foundation For Good	
Towards the costs of developing a wellbeing café in Consett	£20,000
Young People First	
Towards the costs of reorganising the operations of a youth charity in Leamington Spa supporting disadvantaged children	£20,000
Family Holiday Charity	
Towards the provision of holidays for families in need	£18,000
Special Olympics West Midlands Ski Group	
Towards the costs of assisting disabled skiers in the West Midlands	£15,000
Bendrigg Trust	
Towards the costs of running outdoor activity centres in Cumbria catering for adults and children with disabilities	£15,000
Bradby Club	
Towards the core costs of the club for young people in Rugby	£15,000
Coventry Boys and Girls Club	
Towards the core costs of the club	£15,000
Carer Support South Lakes	
Towards the costs of supporting young carers in South Lakeland	£15,000
Dreams Come True Charity	
Towards the costs of fulfilling the dreams of terminally ill children from the Coventry area	£15,000
Notts County FC Community Programme	
Towards the costs of supporting cancer sufferers in the Nottingham area	£15,000
Young Minds Matter	
Towards the costs of mentoring schoolchildren in Stratford upon Avon who have mental health problems	£14,000
Shrewsbury House	
Towards the core costs of a club serving deprived people in Everton, Liverpool	£12,000
Kenelm Youth Trust	
Towards the costs of providing residential camps for young people from the West Midlands	£12,000

YMCA London City and North	
Towards the costs of a youth hub to provide positive pathways for young people in Central and North London	£10,000
Sylvia Beaufoy Centre (The)	
Towards the costs of delivering youth development programmes at the centre in Petworth, West Sussex.	£10,000
Sea Cadets - Nuneaton and Bedworth	
Towards the costs of a new minibus	£10,000
Birstall Urban Motorcycle Project for Youth	
Towards the costs of a facility in Leeds supporting disadvantaged young people by involving them constructively with motorbikes	£10,000
Sea Cadets - Hebbern	
Towards the costs of modernising their engineering facility	£10,000
Central School of Ballet Charitable Trust Ltd	
Towards the costs of free/low-cost recreational dance classes to disadvantaged children in London	£10,000
Sea Cadets - Malvern	
Towards the costs of buying a new minibus	£10,000
City of Coventry Swimming Club	
Towards the costs of two employees to support their sports programmes	£10,000
Dream Makers Childrens Charity	
Towards the costs of providing respite holidays to terminally ill and severely disabled children	£10,000
Barford Youth & Community Centre	
Towards the costs of new lighting for a community hall in Warwickshire	£10,000
Pelton Community Association	
Towards the costs of a youth work programme at the community centre in Pelton	£9,000
Bradfield Club (The)	
Towards the core costs of a youth club in Peckham, London	£9,000
Emerge (UK) Company Limited	
Towards the costs of providing activities for disadvantaged young people in Bradford	£9,000
Caudwell Youth	
Towards the costs of providing mentoring services for young people in Milton Keynes	£9,000
British Disabled Angling Association	
Towards the costs of offering angling opportunities to disabled children and young people in the West Midlands	£9,000
Vision of Adventure	
Towards the costs of providing outdoor adventure opportunities for blind and partially sighted adults	£9,000
Outward Bound Trust (The)	
Towards the costs of providing places on Outward Bound courses	£9,000
Coventry Rugby Community Foundation Ltd.	
Towards the costs of providing holiday breaks to disadvantaged children in Coventry	£7,500
Birmingham Boys and Girls Union (The)	
Towards the costs of installing two shelters for use by the young visitors at an outdoor learning centre near Birmingham	£7,500
Childline	
Towards the costs of providing a national helpline for children and young people	£6,000
Ipswich Community Playbus	
Towards the costs of a bus taking play facilities to families in poor areas of Ipswich	£6,000
Coventry Wheelchair Basketball Academy	
Towards the costs of new equipment	£6,000
Cirdan Sailing Trust	
Towards the costs of sailing courses for disadvantaged young persons	£6,000
Willow Trust	
Towards the costs of providing canal holidays for disabled children and adults	£6,000
Church Army	
Towards the costs of their mission in Gloucester	£6,000
Ratby Cooperative Band	
Towards the costs of an extension to their band room in Leicester	£5,000
Ben Kinsella Trust (The)	
Towards the core costs of an organisation in London tackling knife crime through education and campaigning	£5,000

Highball Trust (Birmingham)	
Towards the costs of a countryside centre near Worcester catering for disadvantaged young people	£5,000
Warwickshire Cricket Foundation (The)	
Towards the costs of providing cricket sessions for blind and partially sighted adults from Birmingham	£5,000
Island N1 (The)	
Towards the costs of a sensory garden for vunerable young people in York	£5,000
Country Trust (The)	
Towards the costs of educational visits to the countryside for young children from inner city areas	£5,000
Farms for City Children	
Towards the provision of practical experience of agriculture and rural life for children from inner city areas	£5,000
Grants below £5,000	£48,500
Leisure, Recreation and Youth Total	**£912,500**

Medical	
Macmillan Cancer Support	
Towards the core funding for the national cancer counselling telephone line	£50,000
Castel Froma Neuro Care	
Towards the costs of furnishing new bedrooms for people with complex neurological conditions in Leamington Spa	£50,000
Pregnancy Expectations Trauma and Loss Society	
Towards the costs of mental health support for West Midlands/Warwickshire parents following the loss of a baby	£30,000
Childhood Eye Cancer Trust	
Towards the costs of supporting children in the West Midlands suffering from the disease	£30,000
Leukaemia Care	
Towards the costs of hospital hubs in the West Midlands supporting leukaemia patients	£21,000
British Epilepsy Association	
Towards the costs of supporting people with epilepsy in Warwickshire and the West Midlands	£15,000
London Hearts	
Towards the costs of providing defibrillators and online CPR training to communities in the West Midlands	£10,000
Multiple Systems Atrophy Trust	
Towards the costs of supporting people in Warwickshire suffering from a life-limiting disease	£9,000
Grants below £5,000	£2,500
Medical Total	**£217,500**

Offenders	
Prisoners' Advice Service Towards the costs of protecting the legal rights of vulnerable prisoners in the Midlands area.	£30,000
Lucy Faithfull Foundation Towards the costs of tackling and preventing child abuse in a variety of ways	£18,000
NEPACS Towards the core costs of an organisation providing support for prisoners and their families at prisons and in court in the North East of England	£15,000
Turnaround Project (The) Towards the costs of education programmes for prisoners in Northern Ireland	£15,000
Association of Visitors to Immigration Detainees (The) Towards the costs of a national network of visitor groups supporting people detained under immigration powers	£15,000
Cleveland Housing Advice Centre Towards the costs of supporting prisoners and ex-offenders in the Tees Valley area	£15,000
Changing Tunes Towards the costs of a tailored music learning project at Swinfen Hall Young Offenders Institution	£15,000
Conservation Foundation (The) Towards the costs of tool shed workshops in various prisons in England	£15,000
Only Connect UK Towards the costs of providing education, training and employment support to ex-offenders in two prisons in London	£15,000
Geese Theatre Company Towards the core costs of delivering theatre-based work in criminal justice and social welfare settings	£15,000
Spurgeons Towards the staffing costs to run their "Boys2Men programme" to improve the outcomes of young offenders in HMP Winchester	£15,000
Liberty Choir UK Towards the costs of running choirs inside and outside prisons in London and the South East	£15,000
YMCA Worcestershire Towards the costs of delivering support to prisoners at HMP Hewell	£15,000
Aldates Community Transformation Initiatives Towards the costs of providing housing and support for prison leavers in Oxford	£15,000
Prison Reform Trust Towards the costs of campaigning for prison reform and running an advice line for prisoners	£12,000
Prisoners Education Trust Towards the core costs of an organisation providing education and training opportunities for prisoners	£12,000
Ikon Gallery Limited Towards the costs of an art education programme at HMP Birmingham	£10,000
Little Angel Theatre Towards the costs of creating a bespoke puppetry workshop experience for inmates and their families	£10,000
User Voice Towards the costs of effectively influencing policy and practice in the justice system.	£10,000
Community Advice and Support Service Towards the costs of a coordinator for the organisation in Exeter	£10,000
Sing Inside Towards the costs providing singing workshops in prisons nationally	£10,000
Midlands Migrant Support Towards the core costs of running their visitor network at Swinderby STHF and HMP Morton Hall	£10,000
Women In Prison Towards costs of supporting women in the criminal justice system nationally	£9,000
Good Vibrations Towards the costs of running music courses in prisons in the West Midlands	£9,000
Fulham Reach Boat Club Towards the cost of supporting serving and ex-offenders across eight prisons on their rehabilitation pathway	£9,000
Treasures Foundation Towards the costs of providing a home for women recently released from prison in Newham	£9,000

Steel Warriors	
Towards the costs of melting down police confiscated knives in London and using the proceeds to build gyms	£6,000
CGL	
Towards the costs of the rehabilitation and resettlement of offenders, ex-offenders and their families	£5,000
New Bridge (The)	
Towards the costs of assistance to prisoners both in prison and following their release	£5,000
NewGround Foundation CIO	
Towards the costs of providing training and employment opportunities for people coming out of prison in Buckinghamshire	£5,000
Grants below £5,000	£3,000
Offenders Total	**£372,000**

Social Welfare	
Priory Pools Community Centre	
Towards the costs of a new community centre in Warwick	£100,000
Heart of England Community Foundation	
Towards the core costs of the foundation	£50,000
Towards the provision of small regular grants to a variety of charities in the Coventry & Warwickshire area	£14,000
Towards the provision of small one-off grants in the Coventry & Warwickshire area	£12,500
Toynbee Hall	
Towards the costs of a free advisory service for people living in Tower Hamlets, London	£45,000
Abbeyfield Midlands (West) Region	
Towards the costs of providing grants to societies in the Midlands to update their sheltered accommodation	£35,000
Life Path Trust	
Towards the costs of caring for people with learning difficulties in Coventry	£30,000
Birmingham Settlement	
Towards the running costs of a charity providing services for disadvantaged people in Birmingham	£30,000
Coventry Rape & Sexual Abuse Centre Ltd	
Towards the core costs of the centre in Coventry	£30,000
Warwickshire Rural Community Council	
Towards the costs of a meals on wheels service for isolated people in Warwickshire	£24,000
CASBA	
Towards the costs of supporting people with learning disabilities in South Birmingham	£21,000
Hope Coventry	
Towards the costs of a befriending service for vulnerable & isolated older people in Coventry	£21,000
Myton Hamlet Hospice Trust	
Towards the costs of funding the hospice in Warwick	£20,000
Harbury Village Library	
Towards the costs of improving the heating system at the library in a village in Warwickshire	£17,000
Edwards Trust	
Towards the costs of supporting bereaved families in the West Midlands	£15,000
Bromley By Bow Centre (The)	
Towards the core costs of an integrated centre for medical and social support for people in East London	£15,000
London Symphony Orchestra Ltd	
Towards the costs of community projects supporting the wellbeing of isolated people in London	£15,000
Father Hudson's Society	
Towards the costs of supporting deprived people in Birmingham in a variety of ways	£15,000
St Martin-in-the-Fields Trust	
Towards the costs of a welcome project for migrants, asylum seekers and refugees at the church in London	£15,000
CARAS (Community Action for Refugees and Asylum Seekers Ltd)	
Towards the core costs of supporting newly arrived asylum seekers across South London	£15,000
Combat Stress	
Towards the costs of supporting veterans in the West Midlands who have mental health problems	£15,000
Action For Kids Charitable Trust	
Towards the costs of specialist mobility equipment for disabled children and young people in the West Midlands	£15,000
Barking & Dagenham Youth Zone	
Towards the costs of training leaders to work with young people at the facility in Barking	£15,000
Age Concern Solihull	
Towards the costs of supporting older residents in Solihull	£15,000
Matthew Project (The)	
Towards the costs of supporting people in Norfolk affected by substance misuse	£15,000
Walsall Society for the Blind	
Towards the costs of supporting blind people in Walsall	£15,000
Shine Out Of School Clubs	
Towards the costs of providing free placements after school for disadvantaged children in the Evesham area	£15,000

Women at the Well	
Towards the costs of providing advocacy and support to women affected by sexual exploitation, homelessness and prostitution in London	£15,000
St. Michael's Church	
Towards the costs of an outreach worker organising a range of wellbeing and community activities in Warwick	£15,000
Trinity Winchester	
Towards the costs of supporting homeless and vulnerable people challenging addiction and substance abuse	£15,000
Community Initiatives South West	
Towards the costs of providing food for disadvantaged families in South West England	£15,000
University College London	
Towards the costs of providing free legal advice to vulnerable communities in Newham, East London	£15,000
UP - Unlocking Potential	
Towards the costs of providing early interventions for children in London with social, emotional and mental health needs	£15,000
ABandOfBrothers	
Towards the core costs of an organisation supporting disadvantaged people in Coventry and Warwickshire	£15,000
Kairos WWT	
Towards the costs of supporting women in Coventry who are at risk of sexual exploitation	£15,000
Home-Start Horizons	
Towards the costs of supporting disadvantaged families in Leicestershire and Rutland	£15,000
Women's Aid Federation of England	
Towards the costs of supporting survivors of domestic abuse nationally to reach safety	£15,000
Home-Start South Warwickshire	
Towards the costs of supporting vulnerable families in their area	£15,000
Jericho Foundation (The)	
Towards the costs of supporting survivors of modern slavery in the West Midlands	£15,000
Improving Lives Plymouth	
Towards the costs of supporting armed forces veterans and their families in Plymouth	£12,000
Suffolk Befriending Scheme for people with LD	
Towards the costs of supporting vulnerable and disabled families and adults in Suffolk	£12,000
Parenting Project (The)	
Towards the costs of counsellors assisting people with mental health problems in Warwickshire	£12,000
Garden Classroom (The)	
Towards the costs of an "Urban Forest School Programme" for primary schoolchildren from Hackney and Islington, London	£12,000
Family Haven (The)	
Towards the costs of supporting vulnerable families in Gloucester	£12,000
Cannon Street Memorial Baptist Church	
Towards the cost of providing regular weekly social and educational activities for older people in Birmingham	£12,000
Citizens Advice Braintree and South Essex Limited	
Towards the costs of giving advice and guidance to welfare benefit applicants	£12,000
Helen Bamber Foundation	
Towards the costs of a new trauma centre supporting victims of human trafficking and torture	£10,000
St. Andrews House	
Towards the costs of improving the community lounge at a care home in Coventry	£10,000
Rainbow Trust Children's Charity	
Towards the costs of supporting nationally families who have a child with a life threatening illness	£10,000
Home-Start North and West Gloucestershire	
Towards the costs of supporting families with young children	£10,000
Desborough Library and Community Hub	
Towards the costs of building improvements to the library in Desborough, Northants	£10,000
Impact Family Services	
Towards the costs of supporting children and adults in South Tyneside affected by domestic abuse	£10,000
FareShare North East	
Towards the costs of a new van enabling food provision across the North East	£10,000

Feeding Coventry	
Towards the costs of modernising and restoring their sports hall in Coventry	£10,000
Samaritans	
Towards the core costs of the national organisation	£10,000
Azalea	
Towards the costs of holistic support for women to leave sex trafficking safely	£10,000
Theodora Children's Charity	
Towards the costs of providing "Giggle Doctors" visiting seriously ill children at Birmingham Children's Hospital	£10,000
Causeway Charitable Services	
Towards the costs of their life supply material assistance programme for survivors of modern slavery	£10,000
Washington Mind	
Towards the core costs of giving mental health support to people in the Sunderland area	£10,000
Navigate CIO	
Towards the costs of providing financial and debt advice to disadvantaged people in Devon and Somerset	£10,000
Family Society	
Towards the costs of equipment for an organisation assisting vulnerable children in Birmingham to be adopted	£10,000
All Saints Community Projects	
Towards the costs of providing after-school activities to disadvantaged children in Kings Heath, Birmingham	£9,000
Walking With In North Tyneside	
Towards the core costs of supporting asylum seekers in North Tyneside	£9,000
Young & Inspired	
Towards the costs of organising breakfast clubs for disadvantaged children in Hackney, London	£9,000
Levenshulme Inspire Foundation	
Towards the costs of supporting disadvantaged people in South Manchester in a variety of ways	£9,000
Joanna Leeds	
Towards the costs of a sanctuary in Leeds supporting vulnerable women	£9,000
Fathers House Elim Church	
Towards the costs of a community hub in Lancaster to help combat food poverty	£9,000
Home-Start Chichester and District	
Towards the costs of supporting vulnerable and isolated families and young children	£9,000
Safety Net (UK)	
Towards the costs of supporting people in Cumbria affected by rape, exploitation and domestic abuse	£9,000
Age UK Exeter	
Towards the costs of funding an information and advice officer to support the needs of older people in Exeter	£9,000
Churches Housing Action Team	
Towards the costs of supporting disadvantaged people in Mid Devon in a variety of ways	£9,000
Warwickshire Reminiscence Action Project	
Towards the core costs of running a centre supporting people affected by dementia in South Warwickshire	£9,000
Beyond the Streets	
Towards the costs of running a national support service for women involved in sexual exploitation	£9,000
Equal People Mencap	
Towards the costs of providing services to support people with learning disabilities in Central London	£9,000
Youthscape	
Towards the costs of a free online programme supporting young people who self-harm	£9,000
Yellow Submarine Holidays	
Towards the costs of supporting people with learning difficulties in Oxfordshire	£9,000
Gloucestershire Young Carers	
Towards the costs of supporting young carers in Gloucestershire	£9,000
The Dash Charity	
Towards the costs of supporting the victims of domestic abuse in East Berkshire	£9,000
MammaKind	
Towards the costs of renting warehouse space for a "baby bank" in Greenwich, London	£9,000
Little Village	
Towards the costs of supporting babies and children in poverty in London	£8,000

Headway Norfolk and Waveney	
Towards the costs of supporting adults with brain injury in Norfolk and Waveney	£7,500
Independent Age	
Towards the costs of supporting disadvantaged older people in London	£6,500
Age UK Warwickshire	
Towards the general costs of supporting older people in Warwickshire	£6,000
Home-Start Norfolk	
Towards the costs of supporting vulnerable families and parents with young children in Norfolk	£6,000
Barnardo's	
Towards the costs of supporting children in Birmingham who have been sexually abused	£6,000
Ambulance Staff Charity (The)	
Towards the costs of providing counselling for ambulance staff in the West Midlands	£6,000
Warwickshire & Northamptonshire Air Ambulance	
Towards the costs of providing an air ambulance facility	£6,000
Devon Community Foundation	
Towards the core costs of the foundation	£6,000
Fiscus North Ltd	
Towards the costs of a children's kitchen to alleviate child hunger and poverty in Sunderland	£6,000
Opportunity Sports Foundation	
Towards the costs of a sports mentoring and training programme for homeless young people in Lancashire	£6,000
Keep Mobile Community Transport	
Towards the costs of a new minibus for a community transport organisation in Berkshire	£5,000
West London Equality Centre	
Towards the costs of sustaining and expanding free legal advocacy for vulnerable individuals and families	£5,000
New Directions Ltd	
Towards the costs of supporting adults with learning difficulties in Rugby	£5,000
South West Coast Path Association	
Towards the costs of co-designing guided coast path walks with disadvantaged communities	£5,000
Listening Books	
Towards the costs of providing audiobooks to people in the West Midlands	£5,000
GL11 Community Hub	
Towards the costs of supporting vulnerable people in Gloucestershire in a variety of ways	£5,000
Disability Advice and Support Hillingdon	
Towards the costs of supporting disabled people In Hillingdon, London	£5,000
St. Chad's Wood End	
Towards the costs of community events at the church in Coventry	£5,000
Enterprise Club for Disabled People (The)	
Towards the core costs of a club in Coventry providing various services to its disabled members	£5,000
St. Paul's Development Trust	
Towards the costs of redeveloping the community hall in Balsall Heath, Birmingham	£5,000
Winston's Wish	
Towards the costs of various projects assisting bereaved children in the Midlands	£5,000
Support Through Court	
Towards the core costs of a volunteer service supporting those facing court alone in Birmingham	£5,000
Surrey Care Trust (The)	
Towards the costs of supporting vulnerable and disadvantaged people in Surrey in a variety of ways	£5,000
Cruse Bereavement Care Coventry & Warwickshire	
Towards the costs of providing bereavement care in Coventry and Warwickshire	£5,000
Grants below £5,000	£59,000
Social Welfare Total	**£1,419,500**
Grand Total	**£5,054,600**