



ANNUAL FUND REPORT

HASLEMERE CHALLICE COMMUNITY FUND

2016

Community Foundation for Surrey

Charity Registration No. 1111600

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PREFACE

Since my report for 2015, the Haslemere Challice Community Fund has continued to grow in performance, management and causes supported within the community.

The Haslemere Challice Community Fund, as part of the Community Foundation for Surrey, has now reached the £1,000,000 mark. Such is a tribute to the hard work and commitment of the Foundation.

Our benefactor, Mrs Challice would surely have welcomed such achievement which has enabled support for so many worthy causes.

In such challenging times, there can be no relenting, no complacency, but rather, the determination to consolidate and improve with each year.

My thanks to all concerned with the Challice Fund and especially the volunteers.



**Bryan Farley BEM
Chair**

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FUND SUMMARY

Total Grants Awarded since establishing the Fund:

88 grants given
to a total value of
£177,736.98

Total Capital Sum to generate income for grants:

£1,021,847

2015-16

Total Grants Awarded:

13 grants given
to a total value of
£33,011.00

Grants Awarded to Support:

- Skills-building activities for young people and those who are currently unemployed
- Supporting elderly people, including those with dementia
- Provision of debt advice and support to residents in need
- Opportunities for local residents to engage in the Arts
- Increasing the confidence and parenting abilities of vulnerable local families

FUND OVERVIEW

Capital Funds – invested to generate income for grants

As shown in the Fund Statement below, the total level of capital funds held is equal to **£1,021,847**.

This figure consists of the following funds within the Community Foundation for Surrey:

- **Haslemere Chalice Endowment Fund**
Established as a permanent endowment fund in March 2008.
- **Haslemere Chalice Community First Endowment Fund**
Established as a permanent endowment in August 2013 and benefiting from the Community First 2:1 endowment match initiative.

Grant-making Funds

Grants are awarded from the **Haslemere Chalice Community Fund**.

This is a Grants Fund, which receives the income generated by the Haslemere Chalice Endowment Fund and the Haslemere Chalice Community First Endowment Fund (above). Any amount up to the full balance of the fund is available for distribution as grants to support projects and activities which meet the fund criteria.

Fund Criteria:

The Fund supports projects and activities which benefit the community of Haslemere and the surrounding areas, including:

- Voluntary and community groups, charities and local residents in need within the area of benefit.
- Existing services or facilities and new initiatives, and can contribute to either capital costs such as funding new equipment or support on-going running costs.

The criteria can be varied and grant awards to specific projects or organisations can be nominated by the Grant Panel, in agreement with the Community Foundation at any time in the future. For example, adding a further area of special concern or to change a priority.

FUND ACTIVITY

Since establishing in 2008 to 31 October 2016, the Haslemere Challice Community Fund has awarded **88 grants totalling £177,736.98**. These grant awards have provided support to organisations serving people of all ages within the local community.

Primary Beneficiary of Grant Awards To Date

Local Residents:	38 grant awards
Children & Young People:	23 grant awards
Older People:	9 grant awards
People with Physical Disabilities:	5 grant awards
Families:	5 grant awards
Disadvantaged/Low Income Individuals:	5 grant awards
People with Learning Disabilities:	2 grant awards
People with General Health Issues:	1 grant award
Total:	88 grants

Grants Awarded in 2015-16:

Between 1 November 2015 and 31 October 2016, the Haslemere Challice Community Fund awarded **13 grants totalling £33,011.00** to support local community projects.

These awards are outlined in the Fund Statement which follows.

Previous Years:

Please note that each year spans the period 1 November – 31 October

In 2014/15 the Haslemere Challice Community Fund awarded 12 grants totalling **£37,417.95** to support 12 local community projects.

In 2013/14, the Haslemere Challice Community Fund awarded a total of **£18,689.10** in grants to support 8 local community projects.

In 2012/13, the Fund awarded a total of **£16,877.53** in grants, supporting 12 local community projects.

In 2011/12, the Fund awarded a total of **£27,554.40** in grants, supporting 19 local community projects.

In 2010/11, the Fund awarded a total of **£14,308.00** in grants, supporting the work of 8 different local organisations.

In 2009/10, the Fund awarded a total of **£13,200.00** in grants, supporting 5 organisations serving the local community

In 2008/09, the Fund awarded a total of **£16,679.00** in grants, supporting 9 local community organisations.

FUND STATEMENT

Accounting Period: 01 November 2015 to 31 October 2016



Haslemere Challice Community Fund

Endowment Statement

Haslemere Challice Community First Endowment Fund

	Receipts	Payments	
Market Value of fund at 31 March 2015			£371,726.71
Realised and Unrealised gains on investments (as at 30 September 2016)	£19,976.37		
TOTAL	£19,976.37	£0.00	
Total Fund			£391,703.08

Haslemere Challice Endowment Fund

	Receipts	Payments	
Market Value of fund at 31 March 2015			£628,446.81
Realised and Unrealised gains on investments (as at 30 September 2016)	£1,697.16		
TOTAL	£1,697.16	£0.00	
Total Fund			£630,143.97

Total Capital Fund: £1,021,847.05

Grants Statement

Haslemere Challice Community Fund

	Receipts	Payments	
Opening Balance at 01 November 2015			£10,561.15
Dividend Receipts and cash distributions from Endowment Funds	£38,365.98		
Grant Transfer – to Surrey Young People’s Fund to support two disadvantaged young people in Haslemere into training & education		£365.00	
Contributions to Community Foundation		£9,656.53	
Grant Payments		£33,011.00	
	TOTAL	£43,032.53	
Balance available for grant making at 31 October 2016			£5,894.60

Haslemere Challice Community Fund Statement of Grants Given

01 November 2015 to 31 October 2016

Date	Applicant	Amount	Note
02/12/2015	Haslemere Fringe Festival	£3,600.00	Haslemere Fringe Festival Costs
02/12/2015	Haslemere Educational Museum	£4,500.00	Museum outreach to older people
02/12/2015	Haslemere Musical Society	£861.00	2016 Concert series
22/02/2016	A Place To Be Youth Group	£4,000.00	Salaries for one Youth Leader and three Youth Workers
04/03/2016	Waverley Hoppa Community Transport	£3,000.00	Support for core running costs of the Direct Responsive Transport service
18/04/2016	Skillway (Warehouse Christian Trust)	£2,500.00	Enabling young people to raise their self-esteem and motivation through apprentice-style teaching of manual skills
13/07/2016	Weyhill In Bloom	£2,000.00	Funding for structural planting in Wey Hill and Junction Place
13/07/2016	3 Counties Money Advice	£2,000.00	Operational costs for local branch of the Frontline Debt Advice charity
13/07/2016	Haslewey	£1,550.00	Computers, software & accessories to aid services offered by Haslewey, including the Brighter Futures Programme for unemployed people & computer drop-in courses for the elderly

13/07/2016	Haslemere Festival	£1,000.00	Artists fees and other festival costs
13/07/2016	Haslemere Hall	£100.00	Funding toward the cost of replacing the heating system in Haslemere Hall
13/07/2016	Haslemere Hall	£3,900.00	Funding toward the cost of replacing the heating system in Haslemere Hall
19/09/2016	Home-Start Waverley	£4,000.00	Supporting tailored and personalised support to disadvantaged and vulnerable families in their homes

13 grants given to the value of £33,011.00

END OF GRANT REPORTS

Organisations which have received funding from the Community Foundation for Surrey are asked to complete an End of Grant Form on the conclusion of the project or period of funding. The report has been designed to help evaluate the success of the project and the beneficial impact of the grant. Organisations are asked to provide feedback on the outcomes of the project and evidence to confirm the conditions of the grant award have been met.

This section of the Annual Fund Report provides details of the summary reports in respect of grants awarded from the Haslemere Challice Community Fund, which have been received and reviewed.

Citizens Advice Waverley

Citizens Advice Waverley was established in 2006 through the merger of three Waverley Bureaux - Farnham, Godalming and Haslemere & Cranleigh District. It is a registered charity whose stated aim is "to help people from all sectors of the Waverley community to resolve their problems through the provision of high quality information, advice and advocacy".

Free, confidential, impartial and independent advice and information is provided through a telephone helpline and face-to-face interviews at four advice centres (located in Cranleigh, Farnham, Godalming and Haslemere). Outreach services are also provided, and a home visiting service is available for people unable to visit their local advice centre because of age or disability.

The advice service is delivered by a team of 150+ trained volunteer advisers, supported by administrative volunteers and a small team of paid staff.

A grant of £6,000 was awarded by the Haslemere Challice Community Fund (£2,250) and another Community Foundation for Surrey Fund (£3,750) in July 2014. This was to provide training, to enable front-line advisers to continue providing high-quality advice and support to approximately 6,000 local people each year.

Citizens Advice Waverley reports as follows:

“The grant was used towards the costs of training 20 new volunteers as Generalist Advisors and 10 new volunteers as Gateway Assessors. This ensured that our volunteer resources remained at the levels required to handle the local demand for our services.

It also helped us to train our existing pool of advisors to ensure that they had the skills necessary to provide high quality information, advice, and advocacy to clients across a range of issues, including; debt, benefits, housing and family issues.

The information, advice and advocacy service that the training enables has benefited the local community in a number of ways, including:

Securing £1.6million in unclaimed financial entitlements for 608 people;
Helping people manage £3.1million of debt;

- Resolving employment related issues for 807 people;
- Preventing 258 local families from losing their homes;
- Resolving consumer related issues for 406 people;
- Making a positive difference to people’s peace of mind, self-confidence and physical health.”

A case study to demonstrate how the project has impacted one beneficiary has been provided:

“Ms X is a single mother with 3 young children. She was living in private rented accommodation after having fled the family home to escape the severe domestic abuse she had suffered. She contacted us by phone when she received an eviction notice from her landlord.

Her call was taken by one of our Gateway Assessors, who made an urgent appointment for her at our office. One of our fully trained advisers explained her legal position to her in relation to her housing rights, discussed her issues with colleagues in Waverley Borough Council’s Housing Options Team, who agreed to see her as a matter of urgency. Because of her circumstances they were able to find social housing locally for her and her children.

Over a series of a week of appointments, our trained advisor also helped Ms X to obtain a restraining order against her violent ex-partner and carried out a full benefits check to ensure that she was receiving her full financial entitlements. This revealed some unclaimed benefit entitlements.

Ms X and her children are now living safely in social housing, and she has recovered enough self-confidence to be seeking part-time paid work.”

The charity also notes that during the time the training was being undertaken, the organisation was independently audited on the quality of services to clients. This audit found these to be of a high quality, and also that the charity’s training processes were thorough and effective.

ARCHIVE

A grant of £4,000 which was awarded from the Haslemere Community Fund in February 2015 to support a participatory arts project to engage with elderly people with dementia, which was developed by Waverley Borough Council, working in partnership with a local theatre company, 'Pursued by a Bear'.

The project, entitled ‘ARCHIVE’, aimed to work with the residents in the dementia wing of Chestnut View Care Home, as well as service users accessing the Marjorie Gray Day Centre and The Orchard Club at the Haslewey Centre. A small artistic team was to work with participants on a weekly basis over a period of 20 weeks, as well as encouraging staff and family members to take part in order to build their skills in techniques such as reminiscence and storytelling. Together, the artistic team and participants intended to devise a performance piece composed of singing and the spoken word, of collated memories and recollections. The final piece would then be performed in the care home and day centres to an invited audience of residents, users, carers, families, staff and community champions.

Waverley has the 2nd highest population of older people in Surrey and is ranked the highest in terms of severe depression for the over 65s. The ARCHIVE projects aims were to improve the quality of creative activities offered to people with dementia, enrich care environments by engaging users, staff relatives and carers in a shared creative process, provide a safe and sociable space for participants’ stories to be heard and capture evidence of the benefits of working creatively with people with dementia to improve public awareness of dementia.

The project worked with 60 Day Centre clients and Care Home residents with varying stages of dementia and very different abilities. The workshops, which were themed around memories of seascapes, gardens and the seasons were designed to stimulate the senses and be responsive to individual needs. This enabled everyone to take part and feel involved, within the boundaries of their abilities.

The workshops used a range of stimulus to provoke the senses, for example touch was used to reveal objects buried in the sand, to plant seeds or pod peas. Baking was used to create familiar smells and tastes and recordings of popular songs, limericks and birdsongs were played to trigger recollections of holidays by the sea and walking in the countryside. Some participants barely had any language abilities but were happy to draw; some only woke up when they heard music and songs while others were able to offer words and descriptions forming the basis of the final four competitions.

Living with dementia is an isolating and lonely experience and several participants spoke to the artists about their battle with depression when they were first diagnosed. The project aimed to be uplifting and celebratory, while creating a safe and trusting environment in which the participants could enjoy making and doing, while talking and laughing together.

The project was deliberately timed to take place in 'World Alzheimer's Month' and the resultant song cycle inspired by the participants and composed by singer/songwriter, Catherine Ireton made a touching contribution to the 'Remember Me' campaign, which encourages people around the world not to forget about loved ones living with dementia.

The final performance was attended by 60 people and offered a great vehicle for raising public awareness of these campaigns. The South East Arts Council Relationship Manager for Diversity and Inclusion took time out of her busy schedule to attend and expressed willingness to have future conversations around funding cultural projects for older people in Surrey. The performance was also filmed as part of a wider film that Waverley Borough Council commissioned, looking at community projects that offer care to the most vulnerable people in society.

The project has opened the eyes and minds of the managers and carers who work for Chestnut View Residential Home and the Marjorie Gray Centre. Not only are the two organisations now more aware of one another but are also talking about joining-up for future activities, daytrips and events. The project has also enabled the development of a stronger relationship with the South West Service Manager for the Alzheimer's Association, which should lead to further creative projects and the programmes being developed.

Short case studies have been provided to demonstrate how the project has benefited the people who took part:

- A wheelchair-bound lady with moderate to severe dementia symptoms began the sessions confused with a slight reluctance. By the end she was asking to play the percussive instruments and appeared to recognise the artistic team when they arrived to run the twice weekly workshops. Care Worker, Sharon said this resident had shown a clear enjoyment and appreciation of the process, including the afternoon entertainment which had been an exciting afternoon out for her in the minibus.
- A 97-year-old with the beginnings of dementia came to every session she could possibly attend. As an ex-music teacher, she became particularly animated when she could contribute to the singing workshops and more especially when she was invited to recall and record her life as the wife of a Mayor! Rosie, her Care Worker said she had never heard or seen her so enthusiastic or animated.
- An ex-merchant seaman in his nineties had a diagnosis of moderate to severe Alzheimer's. The team spent a lot of time with him during the workshop sessions as he was very responsive to chatting, alongside doing companionable tasks (he loved shelling the peas to make necklaces) and on the final performance day he came into the garden on his own accord and confided that he actually knew what his diagnosis was but he had enjoyed a good and full life. We were amazed to witness him talk for the first time with such lucidity. It was very moving and an honour to share his confidence in this way. The Alzheimer's Society care workers have never heard him admit to understanding his condition.

Crossways Counselling Service

Crossways is a registered charity, providing a professional counselling service in Haslemere and the surrounding area for people who otherwise would not be able to afford private counselling sessions. A team of 10 qualified counsellors offer help and support to individuals who are experiencing a variety of difficulties such as:

- Stress
- Depression, anxiety or confusion
- Redundancy, work or retirement- related issues
- Relationship or family difficulties
- Bereavement or loss
- Abuse

Crossways does not make a fixed charge for counselling sessions – clients are invited to contribute on a sliding scale according to their personal ability to pay; no-one is denied counselling through lack of money. Although counsellors offer their services voluntarily, rent, travel, professional and administrative support, and other essential overheads must be covered, so the charity is in need of additional financial support. Hence, a grant of £5,000 was awarded by Haslemere Challice Community Fund in January 2015.

Over the year, the charity had 62 new clients and continued working with over 35 clients from the previous year. 51 clients no longer require support as a result of the counselling which has been provided to them at Crossways.

Counselling is open-ended (although regularly reviewed) to ensure that clients have the time and space they need to really work through their issues in a way that gives them both options and coping strategies for the future. The aim is growth and change, and feedback is obtained from clients about their experience at the end of counselling. Comments include:

“Counselling gave me confidence and re-built my self-esteem. It helped me to stand back and take a better look at my situation.”

“I was helped greatly – to get things in to perspective and to look at all areas of my life with honesty and acceptance.”

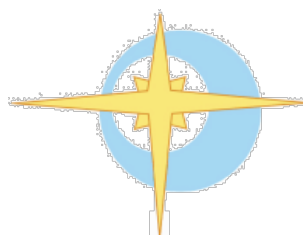
“The counselling I received was of tremendous help to me. Without it I would not have recovered from my deep depression. It was wonderful to talk to my counsellor, to be able to speak so freely and let things roll off the tongue without being criticised.”

Couples and family therapy gives those struggling in relationships the opportunity to work through problems without necessarily parting, which is hugely beneficial for both them and the children. Where parting is the outcome, Crossways can work with parents to separate as amicably as possible and to support the children’s welfare.

Short case studies have been provided, as follows:

“One Family (mum and 4 young children) had lost their father to cancer and were struggling to cope. Family therapy helped them talk together about their feelings and support each other.”

“One young man has been supported through recovery from drug and alcohol addiction and has been able to tackle the underlying reasons for using them as support.”



crossways
counselling service

Haslemere Educational Museum

Established in 1888, Haslemere Educational Museum is a registered charity whose aim is to "forward and advance the study of science, literature and the fine arts by means of a well-equipped museum of natural history and objects of art and of a scientific, literary and historical nature". Through the numerous permanent and temporary exhibitions at the museum, as well as talks, outreach visits, community events and school visits offered at the facility, Haslemere Educational Museum has been providing educational and learning opportunities for over 150 years.

The museum is a well-used community facility with a total of over 35,000 visitors in any one year. The charity's Trustees and staff are supported by approximately 100 dedicated local volunteers.

A Grant of £6,500 was awarded by the Haslemere Challice Community Fund in January 2015, in order to support the Museum's staff costs, in particular during a period in which a new fundraising strategy was to be implemented.

There are several ways in which the museum has developed capacity as a result of the grant funding:

Access: New access materials for special needs have been produced, such as a Social Story for visitors with autism. This is available on the museum's website and may be consulted prior to a visit. Large print materials have also been produced and are available at the reception desk.

Early Birds: An option to visit the Museum at a specially allotted time prior to formal opening hours has been introduced solely for people on the autistic spectrum. These Early Bird visits are supervised by the museum's Education Officer.

Dementia Pilot and New Project: Staff and volunteers received dementia awareness training, making them official Dementia Friends. Various local groups and organisations have been consulted about a new dementia project and some pilot delivery sessions have been undertaken. The feedback has been very positive and the need for such services has been confirmed. All of the groups involved wish to be part of the new dementia programming, which the museum plans to deliver when full funding has been secured.

Hearing Loop: A private donor has pledged to cover the cost of a hearing loop in the Lecture Hall to aid those with hearing difficulties. This will be undertaken as part of a quote for wider audio-visual improvements to the Lecture Hall in the near future.

Membership Review and Membership Benefits: Museum members were contacted in order to update membership details, as well as offer emailing and newsletter options. The membership offer and benefits package were reviewed and additional benefits were added.

Major Donors: Building relationships and introducing methods of stewardship for major donors to ensure successful engagement and satisfaction in the event of support.

Legacies: Developing relationships with legal and financial businesses and thereby their clients, in order to raise the profile of the museum as a worthy benefactor of legacies and bequests. This includes a regular supply of the museum's new bequest leaflet that was developed as a result of consultation with local legal and financial businesses. The updated legacy leaflet is intended to provide an improved level of assurance for legators.

Grant Applications: There are still live grant applications that are pending, and may yet produce results for the museum and its users.

Development of New Fundraising Events: During the period of the grant, two new fundraising events were established for the museum. The first was the 'Motoring for the Museum' car rally and the second was a film night as part of 'Night of Museums'.

In summary, the grant has enabled the museum to undertake fundraising initiatives and improvements, which supports the museum's aim to be sustainable. This means that the museum is able to fulfil its purpose and continue to deliver a public service to the local community and visitors for the long term.

The grant funding has also enabled the Museum to be more inclusive, with particular regard to special needs groups relating to dementia and autism.

The Curator notes:

“We are very grateful to the Community Foundation for Surrey and the Haslemere Challice Community Fund for supporting this project.”

Woolmer Hill School

Woolmer Hill School is a small, mixed comprehensive Secondary School for 650 pupils aged between 11 and 16 years, situated in Haslemere. It is a community school, and the Governing Body includes 6 parent governors, as well as 4 community governors. The school's facilities are set in 24 acres and include a sports centre, design and technology suites, art studios and IT hubs – all designed to encourage an enjoyment for learning.

A grant of £3,349.95 was awarded by the Haslemere Challice Community Fund in January 2015 for the purchase and upgrade of the school's Duke of Edinburgh equipment.

It is reported that so far 130 pupils have enrolled onto the Duke of Edinburgh Award scheme, all of whom are required to take part in sport and volunteering, amongst other activities.

The uptake of participation in the award has increased and more pupils are seeing the award through to completion. In addition, there is now a regular group of staff who support the award. These staff give up their time voluntarily, however having sufficient equipment, has made the award a much more enjoyable and rewarding experience for all.

The School reports:

“Replacing our old stock has given us more confidence that pupils will be safe, warm and dry on expeditions. Pupils have had a much more enjoyable and smooth experience (for example by not having tents which are ripped, or poles taped together, or equipment which is mouldy). They are consequently much more likely to engage in such activities in the future. Our new stock for staff and pupils has reduced the stress of dealing with faulty equipment and complaints from pupils and parents.”

The equipment in the Duke of Edinburgh store has also been made available for other school projects. For example, the compasses, mapping software, jerry cans and chairs have been used on a community day to raise awareness of water as a scarce resource, to clean up the community, and also on sports day. More recently some of the equipment has been used on the Sports Aid Challenge.



APPENDIX: Thank You Letters, Photographs & Publicity

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