

**Report of the
BARROW & GERALDINE S. CADBURY TRUST
PAUL S. CADBURY TRUST
BARROW CADBURY FUND LIMITED**

**6 April 1982 – 5 April 1983
(including 6 April 1980 – 5 April 1982)**

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2 College Walk,
Selly Oak,
Birmingham B29 6LE

Tel. 021-472 0417

Auditors:

Pannell Kerr Forster, Lee House, 6A Highfield Road, Edgbaston, Birmingham B15 3ED

Solicitors:

Wragge & Co., Bank House, 8 Cherry Street, Birmingham B2 5JY.

BARROW AND GERALDINE S. CADBURY TRUST

Founded in 1920, the Trust was originally formed to support those causes which were of particular concern to the Trustees. Its deed empowers it to make grants for general charitable purposes; its income in 1982-3 was £612,000.

Trustees:

Paul S. Cadbury	Catherine R. Hickinbotham	Roger P. Hickinbotham
Dorothy A. Cadbury	Edward P. Cadbury	Anna C. Southall
Geraldine M. Cadbury	Philippa H. Southall	Richard G. Cadbury
Rachel E. Cadbury	Charles L. Cadbury	Erica R. Cadbury-McConnell
		Ruth M. Cadbury

PAUL S. CADBURY TRUST

Established with similar objectives ten years later, the Trust supports those fields in which Paul S. Cadbury has been active. In particular these include environmental education, education for the handicapped, and town planning. Its income in 1982-3 was £109,000.

Trustees:

Paul S. Cadbury	Catherine R. Hickinbotham
Rachel E. Cadbury	Edward P. Cadbury
	Philippa H. Southall
	Charles L. Cadbury

BARROW CADBURY FUND LIMITED

Originally set up in 1924 as a benevolent fund, the assets were transferred to a benevolent company in 1949. The Fund's Directors are able to make grants to individuals as well as to organisations which are not registered charities. Support is also given to help launch new groups before their registration as charities. Its income after tax in 1982-3 was £140,000.

Directors:

Paul S. Cadbury	Catherine R. Hickinbotham	Roger P. Hickinbotham
Dorothy A. Cadbury	Edward P. Cadbury	Anna C. Southall
Geraldine M. Cadbury	Philippa H. Southall	Richard G. Cadbury
Rachel E. Cadbury	Charles L. Cadbury	
Christopher B. Taylor		

STAFF

Members of staff handle matters relating to either of the Trusts or the Fund. All initial correspondence should be addressed to Anthony Wilson unless personal contact has already been made with another member of staff.

Anthony E. Wilson	Secretary
Eric N. B. Adams	Assistant Secretary
Meriel Cooling	Finance Secretary
Carole R. Moreton	Office Secretary (part-time) to the Paul S. Cadbury Trust
Doreen Jacob	Office Secretary to the Barrow & Geraldine S. Cadbury Trust and the Barrow Cadbury Fund Ltd.
Pamela Robson	Office Secretary (part-time) to the Barrow & Geraldine S. Cadbury Trust and the Barrow Cadbury Fund Ltd.

FOREWORD

Reporting the activities of the two charitable Trusts and the non-charitable Company is the responsibility of the Trustees (and in the case of the Company, the Directors) and their professional staff. On the one hand they fully accept that there is a need for clear and correct accountability. On the other, reporting should be simple, understandable and not unduly longwinded.

In the past, reporting has been on a triennial basis and the report, with its supporting tables, has been a sizeable document. This year we are issuing a shortened report dealing in general terms with the policy adopted and including a summarised account of the grants made. It is proposed to issue the report annually in future with at least one section dealing with a particular subject. In this report we explain how we deal with applications. This has given us the opportunity to explain the special relationship between the Trusts and the Barrow Cadbury Fund Ltd., covering charitable and non-charitable activities, carried out from the same office, under the direction of the same Trustees and Directors.

While we have made our past reports readily available to the media, they have received very little publicity. We are circulating this report but with its more limited reporting we are neither expecting nor anticipating much public notice. However, we are anxious that those individuals and bodies who are interested in the methods we adopt to select the outlets for support, should have an opportunity to read it.

Our experience suggests that the most worthwhile activities are made known to us by our contacts with those who have had long experience in the field of social work. Over the years we have built up a network of reliable contacts. These may consist of individuals who have had experience, or bodies run by those who are actively engaged in the day to day management of specific undertakings.

Appeals for help that are based on national or international calamities which have already engaged the public interest are seldom supported. If a matter has already appeared in the media it is usually too late to engage the support of the Trustees and staff. We consider that our responsibility is to try and discover needs that are not so generally recognised.

The accounts show that the cost of administration is substantial. Staff salaries are the main ingredient. This reflects not only the policy of the Trustees to employ members of staff with first class qualifications, but also their encouragement to their staff colleagues to deal with enquiries and expenditure in considerable detail in cases requiring involvement.

The original Trust and the Company, which were founded by Barrow and Geraldine S. Cadbury sixty years ago, are essentially a family activity. At present they are administered by their children, grandchildren and great grandchildren. Five of the great grandchildren are now actively engaged.

Paul S. Cadbury
Chairman

REPORT

An endowed grant-making foundation is constantly faced with two realities: the income available for disposal, and the flow of applications for grants. These are the boundaries within which the Trustees have to define their priorities, and determine the administrative procedures needed to carry them out.

In the case of the two trusts and the non-charitable fund run from this office, the figures are simple. Income for the year ending 5 April 1983 totalled £860,000; and 1068 formal applications were received. The number of new grants approved was 331. These totals, however, cover wide variations: by far the largest proportion of income and expenditure was incurred by the Barrow & Geraldine S. Cadbury Trust; applications varied from standard appeals sent to many foundations, to submissions specifically directed to this office only; grants ranged in size from a few pounds to payments of more than £10,000 p.a. over several years. Abstracts of the annual accounts are set out in appendix I; and tables (a) and (b) present figures relating to grant expenditure in more detail, in appendix II.

The Trustees have been concerned to support work in a wide range of social policy fields. Over the years, their grants have become most concentrated on support for the activities of community groups (neighbourhood and tenants' associations, black self help groups); positive input by the public into penal affairs (extending from victims' support schemes to work with ex-offenders); providing opportunities for small scale employment; and, on occasion, fostering initiatives at a national level which draw on this local experience. In addition, the Trustees are being increasingly drawn into projects, mounted by Quakers and others, which are intended to reduce international tension and promote peaceful relations between groups and nations.

Sections (a) to (j) in appendix III itemise grants under nine subject-matter headings. These are, to some extent, misleading. The Trustees are interested in *how* a voluntary group sets about mounting a new project, as well as exactly *what* it does: and few activities fall neatly into a single subject category.

This approach to grant-making leads the Trustees to work to a number of guidelines:

- (i) With very few exceptions, Trustees expect to respond to other peoples' submissions, not initiate their own schemes.
- (ii) They will tend to be more sympathetic to those applications which are innovative than to those working along generally accepted lines.
- (iii) Although they look for an element of risk as part of the innovative nature of a scheme, they expect the applicant to be in a position to provide effective management.
- (iv) The Trustees will deliberately choose to support projects which experience difficulty in raising funds because they are dealing with topics which, although important, have little public appeal.
- (v) This means that they will expect to be involved in issues and projects before these become the subject of media attention.
- (vi) In order to work along these lines and take advantage of the Trust's location, the Trustees make almost all their 'community' grants to groups operating in the West Midlands area.
- (vii) Their preference for supporting projects in the West Midlands means that, in practice, applications are more likely to 'emerge' from personal contacts within networks, than to be received as unsolicited appeals. This places a particular onus on Trustees and staff alike to be entirely open to new ideas, insights and applications from any source, whether or not the applicant is connected with a known network.
- (viii) Grants at a national level are usually an extension of a local concern in the West Midlands.

In the course of considering new applications, attention has to be paid as to whether the activity will be charitable in the legal sense. If the applicant is already a registered charity, there should be no problem; and if the activity itself is charitable, even if the parent body has not been registered as such, support can normally be given from Trust sources. When the application does not relate to a charitable purpose, Trustees cease to act in their charitable capacities and assume their roles as Directors of the Barrow Cadbury Fund Limited. Separate minutes are maintained for the Trusts and the Fund, and maximum flexibility is ensured.

This method of administration produces its own consequences. The anomalous distinctions which can sometimes occur about what is accepted as 'charitable' in the eyes of the law, do not create major problems for the Trustees/Directors: so they have not been as active as might otherwise be the case in pressing for changes in the interpretation and administration of charity law. Secondly, the much larger proportion of 'charitable' money available to them means that the Barrow Cadbury Fund Limited is inevitably regarded more as an adjunct to the Trusts than a grant-making agency in its own right, free to develop its own priorities and procedures. The Directors are aware that, particularly in the field of employment creation, there may be a more independent role waiting to be played: this will be receiving attention in 1983/4.

Positive Action for Equal Opportunity

In keeping with their interest in supporting work which benefits a wide range of people, the Trustees will in future be paying particular attention to the extent to which black people are participating in the activities which the applicants are carrying out. Birmingham and the West Midlands metropolitan area have a sufficiently mixed population for there to be few places where local activities should not embrace black as well as white people. The Trustees will expect to be informed how far projects which are seeking Trust support are

- (a) taking steps to draw on black as well as white people's skills and experience on management committees;
- (b) ensuring that opportunities for voluntary service are known to black potential volunteers;
- (c) employing black staff, and at what levels;
- (d) effectively including black people among their clients or beneficiaries;
- (e) showing an across-the-board awareness of the multi-racial make-up of the population in the country as a whole, as well as in particular areas.

This multi-racial aspect of an application will be included alongside the Trustees' other considerations listed in (i) to (viii) above. In addition, Trustees will continue to make grants for projects and programmes where race is seen as a primary issue – in which case, it would be listed under the 'race relations' category heading.

Grant Applications

Although Trustees do not draw on formal assessors or consultants, staff and Trustees alike may consult widely – if informally – about new applications. (The Trustees themselves do not expect to be involved in discussions with applicants.) The Trustees have established two specialised groups from amongst their own number, to consider applications bearing on penal affairs and minority arts projects. The former recommend grants, which may be quite large, for ratification at a weekend meeting; the latter has authority to pay small grants – not usually larger than £250 – direct to the beneficiaries. Larger minority arts grants are referred to a main meeting for approval.

If an application comes within the guidelines, it will be placed on the agenda of a Trustees' meeting. The main meetings are held at quarterly intervals; Trustees living in Birmingham can meet on a weekly basis to approve grants for small amounts, and which raise no new policy issues for the Trust. In accordance with their Quaker traditions, Trustees reach their decisions on a basis of consensus, not majority votes. Quarterly meetings normally last up to two and a half hours, to consider an annotated agenda which deals with up to forty items covering twenty-five pages. About fifteen additional applications concerned with penal affairs will be considered by those Trustees who specialise in this field, before or after the main meeting. A further twenty applications are considered by the Minority Arts Programme Trustees. This method of conducting the Trust's main business can only work effectively because of continuous close consultation between office staff and the chairman and individual Trustees, throughout the year.

In the event of a possible application breaking new ground for Trustees, it will be described in the routine review of the month's activities which is sent to all Trustees, with an invitation to indicate whether they wish discussion with the applicant to proceed further. The response at this stage may determine whether the application reaches a quarterly meeting for full discussion, or receives an immediate negative reply.

Should an application not come within the guidelines, a duplicated postcard or brief letter is sent as soon as is practicable. At least one Trustee will have been consulted at this early stage; lists of all applications are sent to every Trustee each month, and individual Trustees then either query or endorse the office's action.

This system of administration tends to mean that most grants remain 'generalist', not requiring detailed specialist knowledge. The penal affairs and minority arts groups provide the exception: three of the Trustees dealing with penal affairs are magistrates, and two of the Trustees on the minority arts group are professionally involved with the arts. Individual Trustees and staff also bring their own particular experience to bear in considering applications. Such expertise as the Trust has developed over the years has been in assessing the viability of the applications before them – at the same time, recognising the specialist knowledge of the applicants in their chosen fields.

Confidentiality and Accountability

All applications and grants are treated as confidential, as are the specific reasons for offering or refusing support. The Trustees are aware of, and sensitive to, the balance of considerations which need to be taken into account in determining what should qualify as public information provided by the Trustees and what should be left to recipients to publicise as they see fit. It is in the nature of the relationship between Trust and applicant that much of the information shared between them should remain confidential; without this assurance, some applicants would experience considerable difficulties in presenting their cases. On the other hand, prospective and actual applicants will need to know the criteria which Trustees will bring to bear in considering applications. Coming within the criteria will not predetermine the outcome of particular requests, since applications which reach the agenda may well exceed the funds available for distribution: but a public statement of the criteria (listed on pages 4 and 5) should enable applicants to judge whether it is worth their while to apply at all.

Lists of recipients are included in the appendices, under each topic. These do not specify the size of grants made. The rationale for this decision is that, from the Trustees' point of view, the extent of their commitment to the receiving agency is not reflected in the size of a monetary grant within a limited time-span; and from the recipients' point of view, the proportion of income derived from the grant can be as important a consideration as the actual amount. The recipient's own published accounts will provide a much more accurate setting in which to judge the significance of the Trust's contribution.

However, the decision whether or not to publish the amount of each grant is a very fine one: and if foundations are called upon to be accountable in general and in detail for their stewardship, the Trustees would gladly respond to this expression of public interest.

The extent to which privately endowed foundations are 'accountable' for their grant-making may become a subject for public debate in the years ahead. Nearly half of their giving is, in effect, subsidised by the taxpayer; and, provided their grants come within legally-defined charitable purposes, and their accounts are submitted to the Charity Commissioners, there is no further legal obligation on the Trustees to present or explain their decisions. The Trustees hope that any codes of good practice which may be adopted by foundations will include the need to report publicly – though the actual content of such reports is likely to vary quite widely.

Income, Inflation and Renewed Support

Reference has already been made to the annual income available to the two Trusts and the Fund. This total figure is, in one sense, artificial. Many grants, and all administration costs, are carried forward from one year to another: so the actual amount estimated to be available for new grants each year will only be a proportion of the whole. The Trustees entered the 1982-3 financial year with an estimated £60,000 uncommitted income; in earlier years, the figure has been lower.

Two other factors also affect income available for new projects. Firstly, inflation during this three year period (27.5%) increased considerably faster than the growth in Trusts/Fund income (21.3%). Secondly, it has proved increasingly difficult for many beneficiaries to obtain funds from other sources after the initial period of support by the Trust: so Trustees have had to decide whether to continue to provide support into a second or even third funding period, as well as whether to increase their annual grants in line with inflation. The usual practice, in the latter situation, is to state the Trust commitment in actual money terms, making such allowance for inflation as the Trustees think fit in the light of estimated income and other commitments at the time of the initial grant.

When reviewing whether to renew support for a further period, the Trustees recognise that while a grant for a new group will depend mainly on promise, that to an existing organisation will depend on performance. Working out some objective measure for 'performance', whose result can then be applied to a grant for a proportion of the work, can result in excessive staff time being devoted to obtaining an answer of spurious accuracy. Instead, the Trustees prefer to reach their decision in the light of answers to three questions:

- (a) Will the new grant serve to generate additional income?
- (b) Will the new grant be used so that more people are involved in providing the service, as well as benefitting from it?
- (c) Will the recipient use the grant in such a way that the outcome is greater public awareness of the issue concerned?

The weight given to each answer will vary with each application: but the Trustees will look for incremental benefits flowing from a decision to renew their support, under at least one of the three headings, as well as an approach which continues to emphasise innovation.

Although there will need to be a specific application for a renewed grant, the Trustees recognise that if they are to reach an informed decision they will need to have kept in touch with the recipient on a routine basis throughout the period of the first grant. The simplest way of doing this is to receive copies of the minutes of the management committee, and this is acceptable to many beneficiaries. One alternative is a more intensive review, based on the material in the recipient's annual reports. When the recipient does not work along such bureaucratic lines as these, the demands on staff time are correspondingly greater – and the number of such groups which can be supported is, correspondingly, fewer.

This limitation can be overcome. If Trustees decide to increase their support for groups which do not operate through detailed paper work, they will be faced with the choice of increasing their own staff, working through intermediaries, or accepting a higher level of risk through inadequate management than has hitherto been acceptable. Since the aim of a grant is to help the recipient to achieve a greater measure of financial independence, a grant-making procedure which allows inadequate management to occur is likely to defeat the purpose of the original support: and without effective record keeping, groups are less likely to survive, let alone develop. Considerations such as these point to the advantages of working through intermediary agencies which can devote the time and expertise to helping with management: and this pattern of grant-making and monitoring may increase in the years ahead.

There can, however, be difficulties if an intermediary body is invited either to pass on the funds, or to perform the monitoring functions. Firstly, once responsibility is delegated, the criteria for passing on the grants have to be more rigid than when the Trustees are exercising the judgment. Secondly, the role of the intermediary, between the Trustees and the recipient, calls for exceptional mutual confidence on the one hand, and clarity concerning roles and procedures on the other. Thirdly, care must be taken that the intermediary agency does not become a 'front' for the Trust, receiving criticism which should properly be directed to the Trust. And fourthly, the Trust must ensure that the conditions under which grants are passed on do not so restrict the autonomy of the intermediary that it becomes seen as a 'stooge'.

It will remain the Trustees' hope that the way in which they work with their beneficiaries, directly or indirectly, will reflect a sense of partnership, with the Trust's financial contribution playing a subordinate part to the inspiration and leadership coming from the agency.

APPENDIX I:

FINANCE

Investments are handled by Baring Brothers & Co., Limited, on behalf of Trustees and Directors. The Trust office is solely concerned with crediting income and recording expenditure; the audit covers both. The figures below for the three years 6th April 1980–5th April 1983 have been abstracted from the full, audited, accounts.

Barrow and Geraldine S. Cadbury Trust

	5th April 1981 £	5th April 1982 £	5th April 1983 £
Investments at Market Value	7,890,791	8,121,835	10,103,136
Other Investment Accounts	469,493	452,801	625,249
	<hr/>	<hr/>	<hr/>
	8,360,284	8,574,636	10,728,385
Loans to Charities	58,449	50,186	46,539
Accumulated Funds	481,446	436,150	459,716
Total Income	565,712	548,330	637,235
Expenditure:			
Grants	465,314	523,229	537,105
Administration Expenses	65,966	70,397	76,564
	<hr/>	<hr/>	<hr/>
	531,280	593,626	613,669
Surplus/(Deficit)	34,432	(45,296)	23,566

Paul S. Cadbury Trust

	5th April 1981 £	5th April 1982 £	5th April 1983 £
Investments at Market Value	1,326,476	1,391,940	1,744,469
Other Investment Accounts	147,973	104,406	155,177
	<hr/>	<hr/>	<hr/>
	1,474,449	1,496,346	1,899,646
Loans to Charities	14,300	16,200	2,100
Accumulated Funds	130,152	138,590	152,859
Total Income	104,094	98,796	109,461
Expenditure:			
Grants	103,536	79,662	82,920
Administration Expenses	10,378	10,696	12,272
	<hr/>	<hr/>	<hr/>
	113,914	90,358	95,192
Surplus/(Deficit)	(9,820)	8,438	14,269

Barrow Cadbury Fund Limited

	5th April 1981 £	5th April 1982 £	5th April 1983 £
Investments at Market Value	2,563,135	2,614,244	3,324,522
	<hr/>	<hr/>	<hr/>
Loans to Non Charitable Organisations	22,650	21,750	20,850
Accumulated Funds	246,072	228,464	232,340
Total Income (net of tax)	141,992	133,841	140,123
Expenditure:			
Grants	79,203	125,037	109,054
Administration Expenses	24,805	26,412	27,193
	<hr/>	<hr/>	<hr/>
	104,008	151,449	136,247
Surplus/(Deficit)	37,984	(17,608)	3,876

APPENDIX II:

GRANTS ADMINISTRATION

Table IIa below presents figures showing actual expenditure on subscriptions and donations, grants, and administrative costs. 'Subscriptions and donations' refers to payments for work with which the Trustees are not closely involved, but are associated with either individually or collectively; 'grants' are payments which were made for projects to which the Trustees are actively committed. 'Administration and Expenses' covers both the costs of running the office and handling the financial investments.

Table II (a)
EXPENDITURE PATTERNS
April 6th 1980 to April 5th 1983

	Subs. & donations £	Grants £	Admin. & expenses £	Tax £	Total expenditure £	Total income £	Excess of income over expenditure £	Excess of expenditure over income £
B. & G.S.C. Trust								
Year to 5.4.1981	12,807	452,507	65,966	—	531,280	565,712	34,432	
Year to 5.4.1982	15,021	508,208	70,397	—	593,626	548,330	45,296	
Year to 5.4.1983	14,920	522,185	76,564	—	613,669	637,235	23,566	
P.S.C. Trust								
Year to 5.4.1981	4,556	98,980	10,378	—	113,914	104,094	9,820	
Year to 5.4.1982	6,430	73,232	10,696	—	90,358	98,796	8,438	
Year to 5.4.1983	5,671	77,249	12,272	—	95,192	109,461	14,269	
B.C. Fund Ltd.								
Year to 5.4.1981	14,851	64,352	24,805	18,092	122,100	160,084	37,984	
Year to 5.4.1982	17,597	107,440	26,412	13,391	164,840	147,232	17,608	
Year to 5.4.1983	16,450	92,604	27,193	4,983	141,230	145,106	3,876	

Table IIb demonstrates the priority which the Trustees give to applications from the West Midlands.

Table II (b)
GRANTS BY AREAS
April 6th 1980 to April 5th 1983

	International		National		West Midlands	
	No.	£	No.	£	No.	£
B. & G.S.C. Trust						
Year to 5.4.1981	35	60,709	51	164,683	106	248,956
Year to 5.4.1982	33	53,077	64	204,258	126	265,894
Year to 5.4.1983	36	59,621	71	230,282	135	247,652
Totals	104	£173,407	186	£599,223	367	£762,502
P.S.C. Trust						
Year to 5.4.1981	—	—	19	639	66	102,896
Year to 5.4.1982	—	—	15	843	72	78,948
Year to 5.4.1983	2	3,000	15	6,712	84	48,255
Totals	2	£3,000	49	£8,194	222	£230,099
B.C. Fund Ltd. (excluding Personal grants)						
Year to 5.4.1981	11	5,960	18	26,747	44	25,403
Year to 5.4.1982	7	7,730	21	48,655	54	50,154
Year to 5.4.1983	9	5,650	11	21,898	49	66,034
Totals	27	£19,340	50	£97,300	147	£141,591

APPENDIX III:

GRANTS: CATEGORIES AND ALLOCATION

Allocating particular grants to specific subject headings can imply a neater, more objective categorisation than is the case. Applicants are rarely concerned with a single, isolated activity. However, an undifferentiated list of payments would obscure what are the topics of concern, so further details are provided in separate appendices dealing with each category.

Table III
GRANTS BY CATEGORIES
April 6th 1980 to April 5th 1983

	Friends & Churches £	Peace & International Relations £	Race Relations £	Education £	Penal Affairs £	Social Service £	Community Planning inc. £	Housing Land & Commuting £	Health & Handicap £	Minority Arts Projects £	Total £
B. & G.S.C. Trust											
Year to 5.4.1980	25,319	32,346	90,353	37,222	91,744	33,495	104,725	57,049	2,095	474,348	
Year to 5.4.1981	27,620	47,877	96,377	34,275	104,751	21,312	125,408	51,545	14,064	523,229	
Year to 5.4.1982	27,739	85,979	93,991	38,058	117,134	25,325	100,390	35,389	13,550	537,555	
	80,678	166,202	280,721	109,555	313,629	80,132	330,523	143,983	29,709	1,535,132	
P.S.C. Trust											
Year to 5.4.1980	5,251	—	—	94,303	560	1,701	311	1,409	—	103,535	
Year to 5.4.1981	6,736	—	—	56,004	35	2,405	12,027	2,584	—	79,791	
Year to 5.4.1982	7,989	228	—	38,340	585	1,901	6,395	2,529	—	57,967	
	19,976	228	—	188,647	1,180	6,007	18,733	6,522	—	241,293	
B.C. Fund Ltd. (Personal)											
Year to 5.4.1980	21,114	7,458	24,466	1,180	16,900	864	6,192	—	1,050	79,224	
Year to 5.4.1981	18,831	8,577	28,388	479	20,432	100	45,974	1,436	1,153	125,370	
Year to 5.4.1982	17,072	4,288	23,158	350	19,798	5,400	39,388	750	450	110,654	
	57,017	20,323	76,012	2,009	57,130	6,364	91,554	2,186	2,653	315,248	
Total grants	£157,671	£186,753	£356,733	£300,211	£371,939	£92,503	£440,810	£152,691	£32,362	£2,091,673	
Number of grants	272	79	134	170	137	122	257	64	63	1,298	

APPENDIX III (a) SOCIETY OF FRIENDS AND OTHER CHURCHES

Most payments go towards the cost of building or extending Quaker meeting houses, and the running expenses of committees which serve the Society of Friends. Occasional grants are made for other churches' own work.

Subscriptions and Donations

Society of Friends Meetings or Meeting Houses in Almley; Bangor; Beccles; Evesham; Farm Street, Birmingham; Forest Hill; High Flatts; Kendal; Leiston; Malvern; Marlborough; Moseley Road, Birmingham; Northfield, Birmingham; Old Jordans, Buckinghamshire; Oxford; Stirchley, Birmingham; Truro; Wells-next-the-Sea; Worcester; Yealand.
Birmingham Council of Christian Education
Birmingham Council of Churches
Birmingham Central Hall
Birmingham Parish Church
Clent Parish Church of St. Leonard
The Friend
Friends Temperance & Moral Welfare Union
Friends World Committee for Consultation
London Yearly Meeting, Society of Friends
Quaker Home Service
Quaker Social Responsibility & Education
The Retreat, York
St. Andrews Methodist Church, Stirchley, Birmingham
South Birmingham Friends Institutes Trusts
Warwickshire Monthly Meeting
Warwickshire Monthly Meeting Education Committee
Warwickshire Monthly Meeting Peace Committee
Woodbrooke College, Birmingham

1980-1983 Total £39,137

Personal – grants for 4 individuals £8,299

Grants

Society of Friends Meetings or Meeting Houses in Barnt Green; Cotteridge, Birmingham.
Balsall Heath Church Centre, Birmingham
Birmingham Medical Mission
Friends School, Great Ayton
Friends World Committee for Consultation
Ireland Yearly Meeting, Society of Friends
London Yearly Meeting, Society of Friends
The Mount School, York
The Project Trust
Quaker Social Responsibility & Education
United Reform Church, West Midlands Province
Warwickshire Monthly Meeting, Woodlands Home for the Elderly
Young Friends Central Committee

1980-1983 Total £53,219

Table III(a)
THE SOCIETY OF FRIENDS AND OTHER CHURCHES
April 6th 1980 to April 5th 1983

	Subs. & Dons. £	International Grants £	Total £	Subs. & Dons. £	National Grants £	Total £	Subs. & Dons. £	West Midlands Grants £	Total £
B. & G.S.C. Trust									
Year to 5.4.1981	—	11,199	11,199	5,950	6,600	12,550	1,320	250	1,570
Year to 5.4.1982	—	4,600	4,600	7,400	10,100	17,500	2,306	3,214	5,520
Year to 5.4.1983	—	4,950	4,950	7,775	14,644	22,419	370	—	370
Total	—	20,749	20,749	21,125	31,344	52,469	3,996	3,464	7,460
P.S.C. Trust									
Year to 5.4.1981	—	—	—	12	—	12	3,239	2,000	5,239
Year to 5.4.1982	—	—	—	52	—	52	5,084	1,600	6,684
Year to 5.4.1983	—	2,000	2,000	2	—	2	4,162	1,825	5,987
Total	—	2,000	2,000	66	—	66	12,485	5,425	17,910
B.C. Fund Ltd.									
							Category not used		

APPENDIX III: (b) PEACE AND INTERNATIONAL RELATIONS

Grants are made for activities designed to improve international relations, reduce conflict, and increase public awareness of issues and opportunities in the field of arms and disarmament.

Subscriptions and Donations

Fellowship of Reconciliation
Quaker Peace & Service
United Nations Association, Central Regional Council
War Resisters International

1980-1983 Total £7,950

Personal – Grants to 11 individuals £8,252

Grants

Action for Reconciliation and Services for Peace (ARSP) volunteers with Cut Boat Folk Ltd., 870 House Youth Unit and Sidney Stringer School & Community Association, Coventry.
At Ease
Bradford University School of Peace Studies
British Council of Churches
Campaign Against the Arms Trade
City University, London
Committee on South African War Resistance (COSAWR)
Concord Films Council Ltd.
Coventry (Lanchester) Polytechnic
Coventry Voluntary Service Council
Fellowship of Reconciliation
Friends World Committee for Consultation
Lansbury House Trust Fund
Manchester Symposium on the Drift towards War
Newham Community Renewal Programme
Oxfam
Quaker Council for European Affairs
Quaker Peace & Service
Lionel Penrose Trust
Rhiannon Trust
Sussex University, Arms & Disarmament Information Unit
Third World First Educational Trust
United Nations Association
Womens International League for Peace & Freedom
Woodbrooke College, Birmingham
World Disarmament Campaign

1980-1983 Total £170,551

Table III(b)
PEACE AND INTERNATIONAL RELATIONS
 April 6th 1980 to April 5th 1983

	Subs. & Dons. £	International Grants £	Total £	Subs. & Dons. £	National Grants £	Total £	Subs. & Dons. £	West Midlands Grants £	Total £
B. & G.S.C. Trust									
Year to 5.4.1981	—	28,746	28,746	—	2,500	—	2,500	—	1,100
Year to 5.4.1982	—	29,838	29,838	—	2,500	10,289	12,789	—	5,250
Year to 5.4.1983	—	31,579	31,579	—	2,250	49,000	51,250	—	3,150
Total	—	90,163	90,163	—	7,250	59,289	66,539	200	9,500
P.S.C. Trust									
Year to 5.4.1981	—	—	—	—	—	—	—	—	—
Year to 5.4.1982	—	—	—	—	—	—	—	—	—
Year to 5.4.1983	—	—	—	—	—	—	—	—	—
Total	—	—	—	—	—	—	—	228	228
B.C. Fund Ltd.									
Year to 5.4.1981	250	4,313	4,563	—	2,645	2,645	—	—	250
Year to 5.4.1982	250	6,700	6,950	—	1,575	1,575	—	—	52
Year to 5.4.1983	—	3,900	3,900	—	300	300	—	—	88
Total	500	14,913	15,413	—	4,520	4,520	—	390	390

Support is given to organisations – black, white or mixed – which are specifically concerned with the racial dimension of an activity or situation.

Personal – grants to 10 individuals £5,369

Grants

Acafess, Birmingham
 Action Group on Immigration & Nationality
 AFFOR (All Faiths for One Race) Trust, Birmingham
 Afro-Caribbean Self-Help Organisation, Birmingham
 Afro-Caribbean Teachers Association, Birmingham
 Afro-Caribbean Youth Council, Walsall
 Ashram Community Trust, Birmingham
 Asian Resource Centre, West Midlands
 Association for the Teaching of Caribbean & African Literature
 Bangladesh Womens Association
 Bangladesh Workers Association
 Birmingham Community Association
 Birmingham Islington & Quinton Circuit of Methodist Churches
 Birmingham Voluntary Service Council
 British Council of Churches
 Brotherhood for Justice Youth Council, Birmingham
 Central Bible Institute Youth Project, Birmingham
 Centre for Intergroup Studies, Cape Town
 Charnwood Community Relations Council
 Church of God, Universal, Birmingham
 Cobden Trust
 Community Education Project (Home Tutors)
 Coventry Community Relations Council
 Crypt Association, Wolverhampton
 Descendants of Africa Association, Coventry
 Exodus, Birmingham
 Friends Community Relations Committee
 Good News Asian Church, Handsworth, Birmingham
 Handsworth Employment Scheme Ltd., Birmingham
 Harambee Housing Association, Birmingham
 Vince Hines Foundation
 H.I.M. Tailors, Birmingham
 Immigration Aid Trust, London
 Immigration Aid Unit, Birmingham
 Link House, Bearwood, West Midlands
 Lozells Social Development Centre, Birmingham
 Migrants Action Group
 National Association for Multi-Racial Education (NAME)
 National Association for the Welfare of Children in Hospital
 Negus, West Midlands
 New Testament Church of God, Birmingham
 PEPAR, Birmingham
 Pilgrim Social Action, Wesleyan Holiness Church, Birmingham
 Runnymede Trust
 St. Basil's Centre, Birmingham
 St. James Advice Centre, Birmingham
 St. Phillips Project, West Bromwich
 Shaheed Udham Singh Welfare Centre, Birmingham
 Southwark Bishop's Discretionary Fund
 Steelhouse Lane Community Project, Wolverhampton
 U.K. Asian Women's Conference, Birmingham
 United Evangelical Youth Project, Birmingham
 WELD, Birmingham
 West Indian Federation Association, Birmingham
 West Midland Baptist (Trust) Association
 West Midlands Caribbean Association
 Westhill College, Birmingham
 Westminster Diocese (R.C.)
 Westminster Monthly Meeting, Society of Friends
 Wolverhampton Community Trust
 Wolverhampton Team Ministry
 Woodbrooke College, Birmingham

Table III(c)

RACE RELATIONS
April 6th 1980 to April 5th 1983

	Subs. & Dons. £	International Grants £	Total £	Subs. & Dons. £	National Grants £	Total £	Subs. & Dons. £	West Midlands Grants £	Total £
B. & G.S.C. Trust									
Year to 5.4.1981	—	—	—	—	26,960	26,960	—	63,393	63,393
Year to 5.4.1982	—	6,000	6,000	—	30,502	30,502	—	59,875	59,875
Year to 5.4.1983	—	5,150	5,150	—	26,535	26,535	—	62,306	62,306
Total	—	11,150	11,150	—	83,997	83,997	—	185,574	185,574
P.S.C. Trust									
Year to 5.4.1981	—	—	—	—	—	—	—	—	—
Year to 5.4.1982	—	—	—	—	—	—	—	—	—
Year to 5.4.1983	—	—	—	—	—	—	—	—	—
Total	—	—	—	—	—	—	—	—	—
B.C. Fund Ltd.									
Year to 5.4.1981	—	720	720	—	7,164	7,164	—	16,582	16,582
Year to 5.4.1982	—	300	300	—	2,500	2,500	—	25,588	25,588
Year to 5.4.1983	—	600	600	—	3,250	3,250	—	19,308	19,308
Total	—	1,620	1,620	—	12,914	12,914	—	61,478	61,478

APPENDIX III:

(d) EDUCATION

Grants in this category are for activities which are primarily educational, or for the benefit of students. Trustees do not expect to maintain their earlier levels of expenditure, now that Money Lane Farm has been brought into the Chapmans Hill School Farm programme.

Subscriptions and Donations

Birmingham Archaeological Society
 Birmingham Association of Friends of the Museums & Art Gallery
 British Federation of University Women
 Cropwood Girls Residential School, Birmingham
 Dodford Children's Holiday Farm, West Midlands
 Fircroft College, Birmingham
 Herefordshire Waterworks Museum Trust
 Hunters Hill Residential School, West Midlands
 Kingsmead College, Birmingham
 Midland Adult School Union
 National Adult School Organisation
 National Association for Environmental Education
 Selly Oak Colleges, Birmingham
 Uffculme School, Birmingham
 Westhill College, Birmingham
 Woodbrooke College, Birmingham

1980-1983 Total £7,597

Personal – grants to 7 individuals

£5,602

Grants

Action for World Development Fund
 Adult Literacy Support Services Fund
 AFFOR (All Faiths for One Race) Trust, Birmingham
 All Children Together Charitable Trust, N. Ireland
 Association of Agriculture
 Association of the Learned Societies in the Social Sciences
 Birmingham Environmental Education Project
 Birmingham Voluntary Service Council
 Boldmere First School, Solihull
 Matthew Boulton Trust, Birmingham
 Edward Boyle Memorial Trust
 Broadcasting Support Services
 Carlson House School, Birmingham
 Chapmans Hill School Farm, Worcestershire
 City University, London
 Dr. Barnardo's, Birmingham
 Farms for City Children
 Fircroft College, Birmingham
 International Family Service, Birmingham
 Jubilee Theatre & Community Arts Co. Ltd.
 Kilworthy House, Tavistock
 Kingswood School, Bath
 Lagan College, N. Ireland
 London School of Economics
 National Adult School Organisation
 National Association of Development Education Centres
 National Association for Environmental Education
 National Institute of Higher Education, Limerick
 PEPAR (Priority Educational Programmes for Action & Research), Birmingham
 Pilgrim Social Action, Birmingham
 Quaker Peace & Service
 Queensway Trust, Birmingham

ROSLA Project, Bristol
 St. James Church, Aston, Birmingham
 St. Paul's Project, Balsall Heath, Birmingham
 Selly Oak Nursery School, Birmingham
 Third World First Educational Trust
 Worgan Trust for Chapmans Hill School Farm and Money Lane Farm

For Student Welfare

Aston in Birmingham University
 Birmingham Polytechnic
 Birmingham University
 Matthew Boulton Technical College, Birmingham
 Bournville College of Further Education, Birmingham
 Brooklyn Technical College, Birmingham
 Coventry (Lanchester) Polytechnic
 Dudley College of Technology, West Midlands
 Hall Green Technical College, Birmingham
 Handsworth Technical College, Birmingham
 North Worcestershire College, Bromsgrove
 Selly Oak Colleges, Birmingham
 Warwick University
 West Bromwich College of Further Education
 Westhill College, Birmingham
 Wolverhampton Polytechnic
 Woodbrooke College, Birmingham

1980-1983 Total £287,013

Table III(d)
EDUCATION
April 6th 1980 to April 5th 1983

	Subs. & Dons. £	International Grants £	Total £	Subs. & Dons. £	National Grants £	Total £	Subs. & Dons. £	West Midlands Grants £	Total £
B. & G.S.C. Trust									
Year to 5.4.1981	100	13,339	13,439	500	9,303	9,803	1,415	12,565	13,980
Year to 5.4.1982	100	12,489	12,589	500	9,000	9,500	1,415	10,771	12,186
Year to 5.4.1983	100	14,792	14,892	500	10,546	11,046	3,065	9,055	12,120
Total	300	40,620	40,920	1,500	28,849	30,349	5,895	32,391	38,286
P.S.C. Trust									
Year to 5.4.1981	—	—	—	6	246	252	84	93,967	94,051
Year to 5.4.1982	—	—	—	6	—	6	88	55,910	55,998
Year to 5.4.1983	—	1,000	1,000	6	6,200	6,206	112	31,022	31,134
Total	—	1,000	1,000	18	6,446	6,464	284	180,899	181,183
B.C. Fund Ltd.									
Year to 5.4.1981	—	500	500	—	680	680	—	—	—
Year to 5.4.1982	—	—	—	—	—	—	—	479	479
Year to 5.4.1983	—	350	350	—	—	—	—	—	—
Total	—	850	850	—	680	680	—	479	479

APPENDIX III:**(e) PENAL AFFAIRS**

Grants are made for work with offenders and their families, victims of crime, and ex-offenders; and for research and debate on the penal system. Priority is given to projects which enable members of the public make a constructive contribution towards ameliorating problems caused or revealed through criminal activity.

Subscriptions and Donations

Athelstan House, Birmingham
Margery Fry Memorial Trust, Birmingham
The Griffins Society, London
Howard House, Birmingham
Quaker Penal Affairs Group, Birmingham
Queensway Trust, Birmingham

1980-1983 Total £202

Personal – grants to 6 individuals

£3,061

Grants

Bath University, for research on penal policy
Belfast Voluntary Welfare Society
Birmingham Rape Crisis & Research Project
Blighty Trust, London
Burnbake Trust, Wiltshire
Cambridge University Institute of Criminology
Caribbean Pastoral Service, London
Central Hall Methodist Church, Birmingham
Christian Action
Cobden Trust
Community Service Volunteers
Criminal Research & Action Group (CRAG), London
870 House Youth Unit, Birmingham
East Birmingham Victim Support Scheme
Frank Foster Fund
Handsworth Victim Support Scheme, Birmingham
Howard League for Penal Reform
Immigrants Aid Trust, for detainees service
Juvenile Court, Birmingham
Keep Out (Juvenile offenders)
Kidderminster Association for Rehousing in Emergency (KARE)
Ladywood & Harborne Victim Support Scheme, Birmingham
Mid-Warwickshire Victims Support Scheme
Monahan, Ms. Jennifer – Book on black people in prison
NACRO (National Association for the Care and Resettlement of Offenders)
National Association for Victims' Support Schemes
National Council for Civil Liberties
Newham Alternatives Project, London
NIACRO, Belfast
Prison Reform Trust
PROP (National Prisoners' Movement)
PROS (Programme for Reform of the Law on Soliciting), Birmingham
Radical Alternatives to Prison
Rape Crisis & Research Project, London
Queensway Trust, Birmingham
St. Basil's Centre, Birmingham
Sandwell Victims Support Scheme
Solihull Victims Support Scheme
South Birmingham Victims Support Scheme
Staffordshire Victim Support Scheme
Wells, Owen, Publisher, for book on probation hostels.

1980-1983 Total £368,674

Table III(e)
PENAL AFFAIRS
April 6th 1980 to April 5th 1983

	Subs. & Dons.	International Grants	Total	Subs. & Dons.	National Grants	Total	Subs. & Dons.	West Midlands Grants	Total
B. & G.S.C. Trust									
Year to 5.4.1981	—	—	—	—	65,645	65,645	22	26,077	26,099
Year to 5.4.1982	—	—	—	—	83,500	83,500	—	21,251	21,251
Year to 5.4.1983	—	—	—	—	86,110	86,110	—	31,024	31,024
Total	—	—	—	—	235,255	235,255	22	78,352	78,374
 P.S.C. Trust									
Year to 5.4.1981	—	—	—	25	—	25	35	500	535
Year to 5.4.1982	—	—	—	—	—	—	35	—	35
Year to 5.4.1983	—	—	—	—	—	—	85	500	585
Total	—	—	—	25	—	25	155	1,000	1,155
 B.C. Fund Ltd.									
Year to 5.4.1981	—	—	—	—	16,094	16,094	—	806	806
Year to 5.4.1982	—	—	—	—	20,408	20,408	—	24	24
Year to 5.4.1983	—	500	500	—	18,198	18,198	—	1,100	1,100
Total	—	500	500	—	54,700	54,700	—	1,930	1,930

APPENDIX III:

(f) SOCIAL SERVICE

Grants in this category are made to agencies which are concerned with advice and relief to individuals in need. It is not expected that Trust expenditure under this heading will increase significantly.

Subscriptions and Donations

Anti-Slavery Society	
Association for the Unmarried Mother and her Child, Birmingham	
Birmingham Federation of Boys Clubs	
Birmingham Mail Christmas Tree Fund	
Birmingham Marriage Guidance Council	
Birmingham Settlement	
Birmingham Voluntary Service Council	
Boys Brigade, Birmingham Battalion	
Boys Brigade, London	
Boys Brigade, 19th Company, Birmingham	
Lady Charles Bruce's Tooting Charity	
Delves House, London	
East Birmingham Family Service Unit	
Girls Brigade, Birmingham Division	
Hall Green & Sparkhill Visiting Service for Old People, Birmingham	
Little Sisters of the Poor, Birmingham	
James Lloyd Almshouses Trust, Birmingham	
Middlemore Homes, Birmingham	
National Marriage Guidance Council	
O.S.P.A. (Outside Staff Pensioners Association, Bournville)	
Railway Benevolent Institution	
Salvation Army, Birmingham	1980-1983

Total £5,403

Personal – grants to 3 individuals

£664

Grants

Birmingham Association of Youth Clubs	
Birmingham Citizens Advice Bureaux	
Birmingham Friendship Housing Association	
Birmingham Settlement	
Birmingham Tribunal Representation Unit	
Birmingham University, for Welfare Rights training programme	
Birmingham Voluntary Service Council	
Bryony House, Birmingham	
Community Forum	
Coventry Voluntary Service Council	
Coventry Womens Information Centre	
Cruse Club, Birmingham Branch	
Cut Boat Folk Ltd., Birmingham	
870 House Youth Unit, Birmingham	
Family Action, Information & Rescue (Midlands)	
Hansel & Gretel Support Group for Handicapped Children, Kidderminster	
Hereford Playscheme for Traveller Children	
Lozells Social Development Centre, Birmingham	
Methodist Church, Droitwich	
Middlemore Homes, Birmingham	
National Children's Homes	
National Council of the Woodcraft Folk	
North Warwickshire Council for Voluntary Service	
Northern Ireland Council of Social Service	
The Open Door, Birmingham	
Queensway Trust, Birmingham	
St. James Church, Aston, Birmingham	
Telford Community Council	
Ulster Quaker Service Committee	
Young Women's Christian Association, Central Club, London	

1980-1983 Total £86,436

Table III(f)

SOCIAL SERVICE
April 6th 1980 to April 5th 1983

		Subs. & Dons. £	International Grants £	Total £	Subs. & Dons. £	National Grants £	Total £	Subs. & Dons. £	West Midlands Grants £	Total £
B. & G.S.C. Trust										
Year to 5.4.1981	50	—	50	50	500	13,445	13,945	250	19,250	19,500
Year to 5.4.1982	50	—	50	50	500	4,750	5,250	250	15,762	16,012
Year to 5.4.1983	50	—	50	50	500	4,993	5,493	310	19,472	19,782
Total	150	—	150	1,500	23,198	24,688	810	54,484	55,294	
P.S.C. Trust										
Year to 5.4.1981	—	—	—	204	50	254	665	782	1,447	
Year to 5.4.1982	—	—	—	204	300	504	640	1,261	1,901	
Year to 5.4.1983	—	—	—	275	100	375	655	871	1,526	
Total	—	—	—	683	450	1,133	1,960	2,914	4,874	
B.C. Fund Ltd.										
Year to 5.4.1981	—	—	—	—	164	164	100	600	700	
Year to 5.4.1982	—	—	—	—	—	—	100	—	100	
Year to 5.4.1983	—	300	300	—	—	—	100	5,000	5,100	
Total	—	300	300	—	164	164	300	5,600	5,900	

APPENDIX III: (g) HOUSING, LAND AND COMMUNITY PLANNING

Support is given to neighbourhood groups, residents associations and community work agencies, particularly those concerned with increasing community involvement in public affairs, housing and the urban environment as this affects living conditions. When grants are made for research, this is to facilitate debate on resource allocation in the public and private sectors.

Subscriptions and Donations

Birmingham Civic Society	Regional Studies Association		
Institute of Housing, London	Town & Country Planning Association		
National Trust		1980-1983	Total £114
Personal – grants to 9 individuals			£3,490

Grants

Association of Community Workers Network, Coventry
Action Resource Centre, Birmingham
American Field Service Trust
American Friends Service Committee
Association of Community Workers Trust
Balsall Heath Association, Birmingham
Belbroughton Playing Fields Association, West Midlands
Bells Farm Community Association, Birmingham
Birmingham Association for Neighbourhood Councils
Birmingham Charitable Trusts Group
Birmingham Community Association
Birmingham Community Resource & Information Group
Birmingham Community Workers Group
Birmingham Council of Christian Churches
Birmingham Diocesan Trustees
Birmingham Education Department
Birmingham Environmental Education Project
Birmingham Federation of Boys Clubs
Birmingham Friendship Housing Association
Birmingham Playing Fields Association
Birmingham Settlement
Birmingham Technical Advisory Service
Birmingham University, for Urban Futures seminar and report
Birmingham University Guild of Students, CoMac Holidays for the Elderly Disabled
Birmingham Voluntary Service Council
Castle Vale Amazing Arts, Birmingham
Central Bible Institute, Birmingham
Centre for Neighbourhood Development, Belfast
Chance to Learn Alliance
Church Hill Residents & Community Association, Redditch
Circle Community Association, Kingstanding, Birmingham
Colton Hills School, Wolverhampton
Community Forum, Birmingham
Community Greenhouse Project, Selly Oak, Birmingham
Community Integration
Copec Housing Trust, Birmingham
Coronation Road Adventure Playground, Selly Oak, Birmingham
Coventry Federation of Tenants
Coventry Temporary Tenants Association
Coventry Voluntary Service Council
Coventry Workshop
Dawberry Hall Tenants Association, Birmingham
Directory of Social Change
Dominica Oversea Nationals Association
Edinburgh University
Elim Pentecostal Church, Kings Heath, Birmingham
Emmanuel Church, Alum Rock, Birmingham
Farm Street Meeting of Society of Friends, Birmingham
1st Frankley (Holly Hill Scout Group), Birmingham
Frankley Community High School, Birmingham
Frankley Mother & Toddler Group, Birmingham
Frankley Playscheme, Birmingham
Friends of the Sheiling, Birmingham
Frontier Youth Trust, London
Glebe Farm Community Association
Handsworth Benevolent Fund, Birmingham
Handsworth Employment Scheme, Birmingham
Handsworth Festival, Birmingham
Handsworth Market Stall, Birmingham

Hastings Centre, Birmingham
Herefordshire Community Council
H.I.M. Tailors, Birmingham
Holly Hill Church Youth Club, Frankley, Birmingham
Hutton Hall Social Club
Industrial Coordinating Unit, Birmingham
Intaskill
International Disaster Institute
Kabaddi Association, Birmingham
Ladywood & Lee Bank Community Groups, Birmingham
Lighthorne & Kilby Tenants Association
Link Club
Stephen Lowe Charitable Trust, London
Lozells Recreation Group, Birmingham
Lozells Residents Association, Birmingham
Lozells Social Development Centre, Birmingham
Lozells United Social Centre, Birmingham
Middle Park Estate Action Group, Birmingham
Moseley Society, Birmingham
Moseley Road Methodist Church, Birmingham
NACRO
National Children's Home
National Council of Voluntary Organisations
National Federation of Community Associations
Newman Hall Community Association
North Warwickshire Council of Voluntary Service
Northern Ireland Council of Social Service
Parents Anonymous
Queensway Trust, Birmingham
Rea Side Tenants Association
Redditch Council for Voluntary Service
Redditch Resource Centre
Rotton Park & Winson Green Youth Employment Scheme Ltd., Birmingham
St. Agnes Church, Cotteridge, Birmingham
St. James Centre, Holyhead, Birmingham
St. Joseph & St. Saviours Youth & Community Association
St. Martins, Perry Common, Birmingham
St. Phillips Parochial Church Council, West Bromwich
Saltley Action Centre, Birmingham
Saltley Festival, Birmingham
Sandwell Council for Voluntary Service
SCAT (Services to Community Action & Tenants)
Selly Oak Hospital Playscheme, Birmingham
Selly Oak Redevelopment Group, Birmingham
Shard End Community & Adult Education Centre, Birmingham
Small Heath Carnival, Birmingham
Solihull Voluntary Community Services
South Aston Residents Association, Birmingham
South Birmingham Residents Group
South Road Housing Co-operative
Sparkhill Carnival Committee, Birmingham
Sparkhill Methodist Church, Birmingham
Steelhouse Lane Community Project, Birmingham
300 Group – Women in Parliament
Unemployment Unit
VOICE, Birmingham
Volunteer Centre
VOSA Ltd.
Warndon Adventure Playground Association, Worcester
WELD, Birmingham
Weoley Hill Church, Birmingham
West Indian Federation Association, Birmingham
West Smethwick Community Association, Sandwell
Westminster Carnival
Winson Green Carnival, Birmingham
Wolverhampton & Bilston Community Workers Group
Wolverhampton Y.W.C.A.
Wood End Community Association, Coventry
Workers Educational Association, Birmingham
Youthaid
Zimbabwe Project

1980–1983 Total £407,188

Table III(g)

HOUSING, LAND AND COMMUNITY PLANNING
April 6th 1980 to April 5th 1983

		International			National			West Midlands					
	Subs. & Dons.	Grants	Total	Subs. & Dons.	Grants	Total	Subs. & Dons.	Grants	Total		Subs. & Dons.	Grants	Total
B. & G.S.C. Trust													
Year to 5.4.1981	—	7,275	7,275	—	33,250	33,250	—	64,200	64,200				
Year to 5.4.1982	—	—	—	—	45,217	45,217	—	80,191	80,191				
Year to 5.4.1983	—	3,000	3,000	—	15,210	15,210	—	68,804	68,804				
Total	—	10,275	10,275	—	93,677	93,677	—	213,195	213,195				
P.S.C. Trust													
Year to 5.4.1981	—	—	—	47	—	47	10	254	264				
Year to 5.4.1982	—	—	—	27	150	177	10	11,840	11,850				
Year to 5.4.1983	—	—	—	10	—	10	10	6,375	6,385				
Total	—	—	—	84	150	234	30	18,469	18,499				
B.C. Fund Ltd.													
Year to 5.4.1981	—	177	177	—	—	—	—	6,015	6,015				
Year to 5.4.1982	—	480	480	—	24,172	24,172	—	21,322	21,322				
Year to 5.4.1983	—	—	—	—	—	—	—	22,747	22,747				
Total	—	657	657	—	24,172	24,172	—	50,084	50,084				

APPENDIX III:

(h) EMPLOYMENT

In previous years, grants for 'employment' came under the Housing, Land and Community Planning heading. With the growth of unemployment in the West Midlands, payments to agencies concerned with promoting job opportunities now come into a separate category.

Personal – grants to 4 individuals £3,091

Grants

Afro-Caribbean Self-Help Organisation, Birmingham
 Handsworth Employment Scheme Ltd., Birmingham
 Handsworth Young Mothers Project, Birmingham
 H.I.M. Tailors, Birmingham
 Industrial Co-ordinating Unit, Birmingham
 Queensway Trust, Birmingham
 Rotton Park & Winson Green Youth Employment Scheme, Birmingham
 St. Paul's Community Workshop, Birmingham
 Tree of Life Shop, Birmingham
 West Indian Association for the Unemployed, Wolverhampton
 Youthaid

1982-1983 Total £49,673

Table III(h)
EMPLOYMENT
 April 6th 1982 to April 5th 1983

	National			West Midlands		
	Subs. & Dons.	Grants	Total	Subs. & Dons.	Grants	Total
B. & G.S.C. Trust						
Year to 5.4.1983	—	8,500	8,500	—	4,876	4,876
Total	—	8,500	8,500	—	4,876	4,876
P.S.C. Trust						
Year to 5.4.1983	—	—	—	—	—	—
Total	—	—	—	—	—	—
B.C. Fund Ltd.						
Year to 5.4.1983	—	—	—	—	16,641	16,641
Total	—	—	—	—	16,641	16,641

APPENDIX III:

(i) HEALTH AND HANDICAP

Although some grants are made to groups concerned with particular health issues, Trustees have concentrated their grants on support for alcoholism research at Birmingham University to the exclusion of most other applications. The policy is not likely to change in the near future.

Subscriptions and Donations

Association for All Speech Impaired Children
 Birmingham Maternity Hospital
 Birmingham Royal Institution for the Blind
 British Red Cross Society
 Churches Council on Alcohol & Drugs
 Dudley Road Hospital League of Friends, Birmingham
 Family Planning Association, Birmingham
 Longwill School, Birmingham
 Monyhull Hospital Sports Fund, Birmingham
 Moreton Hospital Charity Account
 Order of St. John
 Queen Elizabeth Hospital, Birmingham
 Royal Midland Counties Home for the Disabled (Castel Frome)
 Spastics Society

1980-1983 Total £969

Personal – grants to 2 individuals £2,086

Grants

Aquarius, Birmingham
 Birmingham University for Alcoholics Rehabilitation Research Group
 Birmingham Royal Institution for the Blind
 British Institute of Mental Handicap
 Coventry Study on Tranquilliser Use Among Women
 Federation of Alcoholic Rehabilitation Establishments (FARE)
 Midland Spastic Association
 Royal Orthopaedic Hospital League of Friends Birmingham
 West Midlands Council for the Disabled

1980-1983 Total £149,638

Table III(i)
HEALTH AND HANDICAP
 April 6th 1980 to April 5th 1983

	National			West Midlands		
	Subs. & Dons.	Grants	Total	Subs. & Dons.	Grants	Total
B. & G.S.C. Trust						
Year to 5.4.1981	—	30	30	—	57,019	57,019
Year to 5.4.1982	—	—	—	—	51,545	51,545
Year to 5.4.1983	—	3,719	3,719	—	31,670	31,670
Total	—	3,749	3,749	—	140,234	140,234
P.S.C. Trust						
Year to 5.4.1981	49	—	49	180	1,180	1,360
Year to 5.4.1982	104	—	104	180	2,300	2,480
Year to 5.4.1983	69	50	119	285	2,125	2,410
Total	222	50	272	645	5,605	6,250
B.C. Fund Ltd.						
Year to 5.4.1981	—	—	—	—	—	—
Year to 5.4.1982	—	—	—	100	1,336	1,436
Year to 5.4.1983	—	—	—	—	750	750
Total	—	—	—	100	2,086	2,186

APPENDIX III:

(j) MINORITY ARTS PROGRAMME

Grants of up to £500, but usually of no more than £250, are made to ethnic minority groups or wider associations promoting minority arts. Occasionally larger grants are recommended from within the main Trust budget for projects likely to make a significant contribution to the development of Minority Arts in the West Midlands.

Personal – grants to 2 individuals £575

Grants

Acafess, Birmingham
 Afro-People's Association, Birmingham
 Asian Arts Productions, Sandwell
 Balsall Heath Church Centre, Birmingham
 Bandura Fellowship, Broseley, Shropshire
 Banner Theatre Co. Ltd., Lozells, Birmingham
 Belgrave Theatre Trust, Coventry
 Birmingham Community Association
 Birmingham Voluntary Service Council
 Cannon Hill Trust Ltd., Birmingham
 Castle Vale Amazing Arts, Birmingham
 Colton Hills School, Wolverhampton
 Coventry Community Relations Council
 Coventry Voluntary Service Council
 Forest Hill Community Centre, Walsall
 Gazebo Theatre in Education Co. Ltd., Walsall
 Handsworth Employment Scheme Ltd., Birmingham
 Hereford Diocese Council of Education
 Highfields School, Wolverhampton
 Hindu Sevika Samiti, Sparkhill, Birmingham
 Holy Trinity Church Council, Handsworth, Birmingham
 Joint Stock Productions Ltd., Aston
 Jubilee Theatre & Community Arts Co. Ltd., Sandwell
 Martin Luther King Movement Trust, Birmingham
 Latvian Song Festival, Leicester
 Lozells Recreation Group, Birmingham
 Midland Centre for Music in Schools, Birmingham Polytechnic
 Midlands Arts Centre, Birmingham
 Minority Arts Advisory Service, West Midlands
 NACRO
 The Naseby Centre, Alum Rock, Birmingham
 On Yer Bike Street Theatre Group, Sheffield
 Prema Project, Gloucestershire
 Queensbridge School, Birmingham
 Queensway Trust, Birmingham
 Rutland Community Resource & Arts Bus
 St. Agnes Church, Cotteridge, Birmingham
 St. Michael's Church, Handsworth, Birmingham
 Saltley Action Centre, Birmingham
 Sandwell Council for Voluntary Service, West Midlands
 Sheldon Heath School, Birmingham
 Small Heath Community Centre, Birmingham
 Soyikwa Theatre Productions, Birmingham
 Trinity Arts Association (Birmingham) Ltd.
 West Midlands Arts, Stafford
 Wolverhampton Seventh Day Adventist Church

1980-1983 Total £31,787

Table III(j)
MINORITY ARTS PROGRAMME
April 6th 1980 to April 5th 1983

	National			West Midlands		
	Subs. & Dons.	Grants	Total	Subs. & Dons.	Grants	Total
	£	£	£	£	£	£
B. & G.S.C. Trust						
Year to 5.4.1981	—	—	—	—	2,095	2,095
Year to 5.4.1982	—	—	—	—	14,064	14,064
Year to 5.4.1983	—	—	—	—	13,550	13,550
Total	—	—	—	—	29,709	29,709
P.S.C. Trust						
Year to 5.4.1981						
Year to 5.4.1982					Category Not Used.	
Year to 5.4.1983						
Total						
B.C. Fund Ltd.						
Year to 5.4.1981	—	—	—	—	1,050	1,050
Year to 5.4.1982	—	—	—	—	1,153	1,153
Year to 5.4.1983	—	150	150	—	300	300
Total	—	150	150	—	2,503	2,503

Trustees prefer to provide short-term assistance to recipients, in the hope that income from other sources will become available. Grants are rarely made for more than three years, but recipients are free to apply for renewed support. The Trustees will look for continued innovation in the service being provided, and will consider their response in the light of whether a new grant will have an incremental effect on other income, the numbers of people involved, and public awareness of the issue.

Applications and Procedure

Full Trustees' meetings are held quarterly, normally in March, June, September and December. All major applications are considered, in principle or in detail, at such meetings. Trustees living in Birmingham can meet weekly to endorse a particular application already approved in principle, or to make a small grant which raises no new policy issues.

The office has no application forms; and rather than receive an application which is geared to the interests of the Trustees, the staff prefer to receive copies of minutes and working papers which indicate the thinking which has gone into making the application. A report is sent to Trustees each month, with information on applications which are under discussion and listing all appeals which have been received.

It is appreciated if unsolicited applications are made in writing rather than by telephone, as this allows staff and Trustees to give them proper consideration.

When Trustees decide not to support an unsolicited application, they prefer to follow a standard procedure, using a personally addressed duplicated reply card, so that costs are kept low. It is hoped that applicants will appreciate the reasons why detailed correspondence is not conducted on each appeal received.

If a grant is made it is the usual practice of the Trustees to ask that publicity be avoided. This is for two reasons: firstly, publicity about the source of funds may divert attention from the project actually being supported; secondly, the public injection of outside funds to a voluntary organisation may create an impression that the treasurer – and executive committee – is responsible to the donor Trust rather than the membership. Whether the source of the grant should be specifically mentioned in the annual report, or entered as "from a charitable trust" in the published accounts, is normally a subject of discussion between the recipient and Trust staff. It is, however, accepted that there could be circumstances where an explicit statement of the source of funds is desirable.

For the same reasons as they prefer anonymity, the Trustees do not expect to be represented on the management or executive committees of agencies which they support, unless they or the office staff have initiated the scheme or have personal or professional skills to offer. It is the belief of the Trustees that the feeling of mutual trust and respect between recipient and Trust should be established before the grant is made. The subsequent sharing of ideas, information and problems then avoids any implication of control by the Trust.

Triennial reports were published by the Trusts and Fund in 1977 and 1980. Since 1983, the Report is being produced annually. Copies are obtainable from the office.

Staff

Unless personal contact has already been made with another member of staff, initial correspondence should be addressed to Anthony Wilson in respect of either Trust or the Fund.

Anthony Wilson	secretary
Eric Adams	assistant secretary
Meriel Cooling	finance secretary
Carole Moreton	office secretary (part-time) to the Paul S. Cadbury and Worgan Trust
Doreen Jacob	office secretary to the Barrow & Geraldine S. Cadbury Trust and the Barrow Cadbury Fund Ltd.
Pamela Robson	office secretary (part-time) to the Barrow & Geraldine S. Cadbury Trust and Barrow Cadbury Fund Ltd.

Auditors:

Pannell Kerr Forster, Lee House, 6A Highfield Road, Edgbaston, Birmingham B15 3ED

Solicitors:

Wragge & Co., Bank House, 8 Cherry Street, Birmingham B2 5JY.

September 1983

THE BARROW & GERALDINE S. CADBURY TRUST

THE PAUL S. CADBURY TRUST

THE WORGAN TRUST

THE BARROW CADBURY FUND LIMITED

2 College Walk, Selly Oak, Birmingham B29 6LE
Telephone: 021-472 0417

The Barrow & Geraldine S. Cadbury Trust and its associated Trusts

The four Trusts run from 2 College Walk share the same Trustees and a common secretariat. Each was set up, since the establishment of the Barrow & Geraldine S. Cadbury Trust in 1920, to meet changing circumstances and new opportunities; the following notes indicate the background to the policies, priorities and procedures current in 1983.

The Barrow & Geraldine S. Cadbury Trust was created in response to fiscal and taxation changes introduced after the First World War, so that the founders – who became the original Trustees – could regularise their support for those causes which engaged their personal concern. The purposes of the Trust were designated to cover the whole range of 'charitable objects', but excluded grants to individuals. Present disposable income is about £650,000 p.a. tax free, from investments.

The Barrow Cadbury Fund Ltd. was originally set up in 1924 as a benevolent fund with a two-fold purpose: to supplement pensions of e.g. retired Quaker staff and social workers, and make grants to those organisations which were not recognised charities. Its assets were transferred to a benevolent company, with similar objectives, in 1949. Present income, after tax, is £140,000 p.a.; the Directors are appointed by the 25 members, who meet annually to receive reports.

Paul S. Cadbury is chairman of both the Barrow & Geraldine S. Cadbury Trust, and the Barrow Cadbury Fund Ltd. His more personal interests are supported through the **Paul S. Cadbury Trust** (established as a charity in 1931); these cover particularly those fields in which he has been active, including town and country planning, and environmental education. The income is £115,000 p.a.

The Worgan Trust was created in 1966. It has no endowment, but receives funds from the other Trusts to purchase land or property for amenity purposes. Coopers Mill Youth Centre, in the Wyre Forest near Bewdley, belongs to and is administered by the Worgan Trust: applications to take parties of children for weekends or longer should be addressed to 2 College Walk.

The Worgan Trust has also been instrumental in setting up **Chapman's Hill School Farm Ltd.** with the active co-operation of the Birmingham City Education Committee. Grants from the Paul S. Cadbury Trust enabled Money Lane Farm to be purchased in 1980; while Chapman's Hill caters for junior school children, Money Lane has been adapted for visits by infants. Bookings should be made through the Education Department.

The offices at 2 College Walk are situated in the Selly Oak Colleges' Central House. The Trusts occupy these premises as tenants, and are not in any way involved in the Colleges' administration; nor do the Trusts corporately or Trustees individually have active links with Cadbury Schweppes Ltd. or the Bournville factory, although the Trusts remain substantial shareholders.

Priorities and Criteria

Grants approved by Trustees are usually geared to an element of innovation in some aspect of social policy: this normally claims a higher priority than contributing to the costs of an existing service. Preference is also given to funding work which would have difficulty in obtaining sufficient funds from other sources, statutory or voluntary. Registration as a charity is not always necessary, as grants can be made from the Barrow Cadbury Fund Ltd.

The majority of projects which are supported by the Trustees relate to conditions either in the inner cities, or suburbs and housing estates, within the West Midlands metropolitan county. Grants normally cover community work by groups based on neighbourhoods; activities, including the arts, sponsored by black peoples' organisations, or by mixed groups exploring ways of living together in a multi-racial Britain; schemes which provide opportunities for employment for those who would otherwise be unable to secure paid work; or the rehabilitation of offenders, and support for schemes to help the victims of crime. These categories are not exclusive, however: Trustees also make grants for other types of work which relate to the needs of those who suffer from poverty, discrimination, addiction or handicap.

Increasing support is also being given to agencies which are committed to finding ways of reducing international tension. Trustees are most sympathetic to applications which are compatible with their Quaker beliefs.

Within these broad lines, Trustees and staff normally work to the following criteria:

- (a) New projects which serve a particular locality in the West Midlands are given preference over those in other regions.
- (b) Outside the West Midlands, grants are to schemes or agencies having national significance.
- (c) Research grants are made where the subject matter is of specific interest to the Trustees: the initiative is usually taken by the relevant Trust.
- (d) Bursaries are not normally given to individual students, or research graduates, although arrangements are made with West Midlands universities and colleges to supplement the allowances of students from overseas if these are reduced or cut off during their course of studies.

- (e) The Trustees rarely respond to general appeals.
- (f) The emphasis on innovation carries with it obligations for Trust and applicant alike. The former must accept the element of uncertainty involved; the latter should be prepared to look for other sources of finance once the initial phase of Trust support is concluded.
- (g) The Trust staff will expect to discuss with applicants whether the costs of their scheme should be met in full by the Trust, or only in part. A total grant may relieve the organisers of financial worries for a limited period; whereas a broader basis of support than a grant from a single body may contribute to greater continuity and credibility.
- (h) Grants may be made for capital expenditure, or to meet recurrent costs over a number of years. However, it is not normally possible for the Trustees to link the value of their recurrent grants to the rate of inflation.
- (i) The size of the grant is not necessarily a measure of the importance of the work being undertaken, and office staff try to respond to requests for small grants with the same care as that exercised on large schemes.
- (j) Applications to purchase premises at short notice are rarely approved.

The West Midlands conurbation has a population which reflects a wide range of racial origins. The Trustees are therefore concerned that their grants should be directed towards those applicants, of any race, whose activities take account of the ethnic composition of the public to be served. The Trustees will expect to be informed how far projects which are seeking Trust support are

- (i) taking steps to draw on black as well as white people's skills and experience on management committees;
- (ii) ensuring that opportunities for voluntary service are made known to black potential volunteers;
- (iii) employing black staff, and at what levels;
- (iv) effectively including black people among their clients or beneficiaries;
- (iv) showing an across-the-board awareness of the multi-racial make-up of the population in the country as a whole, as well as in particular areas.

This multi-racial aspect of an application will be included alongside the Trustees' other considerations listed in (a) to (j) above.