



**Mapping European Independent Funders' Initiatives on Ageing
Project prepared for King Baudouin Foundation**

**by the European Foundation Centre Orpheus Programme
NOT FOR DISSEMINATION**

Brussels, 22 April 2005

1 Independent Funders comprise two main groups:

- Foundations that are independent separately constituted non-profit bodies with their own governing board and with their own source of income whether or not exclusively from an endowment. They have been irrevocably attributed goods, rights and resources for the performance of work and support for public benefit purposes, either by supporting associations, institutions or individuals etc., or by operating their own programmes. Foundations have no members. This definition excludes private purpose foundations.
- Corporates that make charitable contributions including grants, gifts-in-kind, matching support, technical assistance, employee volunteering, through specific citizenship and community investment programmes

Table of Contents

Introduction	4
Findings	6
Profiles	8
1. Anglo-German Foundation for the Study of Industrial Society.....	8
2. The Atlantic Philanthropies	10
3. Atviros Lietuvos Fondas	12
4. Balance Charitable Foundation for Unclaimed Assets	14
5. Bertelsmann Stiftung	16
6. Big Lottery Fund.....	19
7. Bridge House Estates Trust Fund	20
8. Carnegie United Kingdom Trust.....	22
9. Centrica plc	24
10. Charles Hayward Trust	26
11. The Community Foundation for Northern Ireland.....	28
12. Esmée Fairbairn Foundation	29
13. Fondation Caisses d'Epargne	31
14. Fondation Claude Pompidou.....	33
15. Fondation de France.....	34
16. Fondation Nationale de Gérontologie.....	36
17. Fondazione Cassa di Risparmio delle Provincie Lombarde	38
18. Fondazione Rodolfo DeBenedetti	40
19. Fundação Calouste Gulbenkian	42
20. Fundació 'La Caixa'.....	44
21. Fundación María Francisca de Roviralta	46
22. Fundación Telefónica.....	47
23. The Henry Smith Charity	48
24. Herman Bouma Fonds voor Gerontechnologie Stichting	50
25. Johnson & Johnson	52
26. Joseph Rowntree Foundation	55
27. Körber-Stiftung	57
28. Kuntoutussäätiö.....	59
29. The Nuffield Foundation.....	61
30. People in Need Trust.....	62
31. The Rayne Foundation	63
32. Robert Bosch Stiftung GmbH	65
33. Stefan Batory Foundation	67
34. Stichting Het R.C. Maagdenhuis	69
35. Stiftelsen Riksbankens Jubileumsfond	71
36. Tesco PLC.....	73
37. Tudor Trust	75
38. The Worshipful Company of Information Technologists' Charitable Trust.....	78

Other Funders (Further research required)

39. Blagotvoritelny Fond razvitiya goroda Tyumeni	80
40. Boots Charitable Trust	81
41. Co-operating Netherlands Foundations for Central and Eastern Europe.....	83
42. Community Foundation for Wiltshire and Swindon	84
43. Compagnia di San Paolo	86
44. Dagmar and Václav Havel Foundation Vize 97.....	87
45. Derbyshire Community Foundation.....	89
46. Fondazione UMANA MENTE	91
47. Fundación Caja de Madrid	92
48. Fundación Caja Rioja	93
49. Fundación Ramón Rey Ardid.....	94
50. The Grocers' Charity	95
51. The Jerusalem Foundation	97
52. The Lankelly Foundation	99
53. Nadace Euronisa.....	102
54. Norman Collinson Charitable Trust	103
55. Oranje Fonds	103
56. The Percy Bilton Charity	105
57. Výbor dobré vule - Nadace Olgy Havlové.....	106
58. W.P.Schmitz-Stiftung.....	108
59. The Yapp Charitable Trust.....	109
Overview Table.....	110

INTRODUCTION

The King Baudouin Foundation is exploring the issue of ageing and its impact on society (including sectors of the population other than the elderly). As a part of its exploration exercise, it approached the Orpheus Programme to carry out a short mapping on activities of European Independent funders in relation to ageing.

OBJECTIVES OF MAPPING

The findings of the mapping project will assist the King Baudouin Foundation to prepare its new “strategic plan” for 2006-2008. The project sought to identify relevant independent funders for inclusion and produce profiles according to the specifications agreed with the King Baudouin Foundation. These would include among others information on funders’ mission statement, programme areas, types of support and geographical focus.

DEFINING PROJECT SCOPE

The project seeks to identify any European independent funders’ initiatives in relation to ageing, with a specific interest in the following topics:

- Initiatives for persons aged 65+
- Initiatives for persons aged 85+
- Debating about ageing (between generations...)
- Ageing and society (prospective thinking on the impact of ageing upon our societies)
- Ageing and social justice
- Quality of life of low-income elderly (pensioners...)
- Ageing and solidarity between generations
- Ageing and gender issues
- Ageing and migration (elderly migrants, migrant workers involved in elderly care...)

GEOGRAPHICAL ORIGIN OF FUNDERS

The following funders are included in the mapping project:

- Funders whose primary address is in Europe² funding cross border initiatives linked to ageing
- Funders working within their national boundaries in Europe subject to the following conditions:
 - they have significant philanthropic programmes and are a valued point of reference in the field
 - their programmes are small but innovative and may be considered examples of best practices
 - their programmes are proactive and responsive to the need for action in the field
- Funders from outside Europe but EFC members, active in and with Europe on issues related to ageing

² Europe in this context includes EU Member States and neighbouring countries, including Newly Independent States (NIS).

PROJECT TIMELINE AND DELIVERABLES

Normally, the EFC Orpheus Programme mapping research cycle³ takes up to 12 months, which includes a validation of the information by each organisation that has been selected, and the production of a printed publication. It was understood that due to the time constraints, the profiles would not be verified by funders. Should this preliminary mapping lead to a more comprehensive research (which includes profile verification by funders), then the profiles and accompanying documents would be made available and promoted via the EFC websites (www.efc.be, www.fundersonline.org).

The outline below presents the work conducted over 4 working days. For full details of the Orpheus methodology, please see Annex 1.

- **Mapping:** Identification of relevant funders, data collection and data processing. This includes:
 - Database search
 - Literature review and Internet research
 - Development of draft profiles on the basis of publicly available information
- **Table of Funders' Initiatives.** Development of an easy-to-read overview of the funders, their country of origin and type of activities (descriptive and keywords)
- **PDF Dossier** comprising table of contents, funders profiles and overview table

DISSEMINATION

The PDF dossier is provided electronically to the King Baudouin Foundation. The profiles will be retained in the Orpheus Funders Database for further possible development and dissemination.

EFC ORPHEUS PROGRAMME

The mapping was conducted by the EFC Orpheus Programme, which is designed to create and sustain a public record and information service on the work of foundations and corporate funders in Europe. The programme is project-funded. The Orpheus Programme maintains a database of detailed profiles of hundreds of funders across Europe and worldwide. In its work, it draws on an extensive expertise of contact and information gathering. This profile database is the EFC's major research and trends analysis resource, and has proved to be an invaluable tool in meeting funders' knowledge needs. The EFC Orpheus team has proved to have the necessary tools and expertise to carry out topic specific mappings.

³ See Annex 1: EFC Orpheus data collection & input methodology for mapping

FINDINGS

A total of 59 profiles were prepared for this mapping exercise. Information regarding the work of funders in relation to the elderly is provided within the main **Programme Section**. In most cases, additional information was provided in the section specifically dedicated to **Ageing Activities**, which outlines programmes, projects, representative grants and examples of good practices.

The following lines of funders' actions have been identified:

❖ **Improvement of the lives of the elderly**

Includes initiatives which aim to:

- Overcome age barriers/age discrimination in the labour market
- Improve housing
- Research and implement innovative caring
- Support advocacy services
- Improve accessibility to natural environment for recreational use
- Improve accessibility to commercial facilities (shopping, post office etc)
- Enable to take active part in community life
- Support schemes that fight isolation and depression
- Bring new technology into the life of senior citizens

❖ **Public perception of ageing and the elderly**

Includes initiatives which aim to:

- Collaborate with community-based education and research organisations
- Expand volunteering opportunities for older people
- Develop and enhance intergenerational activities and programmes
- Promote participation of senior citizens in policy debates
- Support expert commission on senior citizen policies
- Demographic change campaigns, taking into account social and economic changes
- Involve industry associations, interest groups, public administration and political leaders
- Encourage local community and voluntary groups to become involved in equality building
- Support actions that promote the potential and experience of elderly people
- Develop volunteerism among citizens to help older people
- Study status and role of carers for the elderly
- Develop areas where older people can socialise
- Develop information services and publications
- Participate in international activities in the field
- Develop public lectures on pension and welfare schemes
- Contribute to a European longitudinal database using interview data that can be used complex relations between social, economic, health related factors

❖ **Self-perception of the elderly**

Includes initiatives which aim to:

- Develop creativity and self-esteem of the elderly
- Empower residents in nursing homes or the elderly in the community in order to give them choice and control of their daily lives

❖ **Partnering opportunities with community organisations**

Includes initiatives which aim to:

- Support charities concerned with issues that affect the elderly
- Cover capital costs of day care, domiciliary care and training in hospices
- Develop credit action schemes in local community organisations
- Support self-help groups involving older people through community-based organisations

❖ **Developing exemplary models of schemes targeting the elderly**

Includes initiatives which aim to:

- Research and develop new positive views on ageing
- Develop new models for work participation tapping into senior citizen productivity potential
- Develop alternatives to traditional nursing or senior citizens facilities, including models for preventive treatment, geriatric rehabilitation and care
- Develop sustainable models for long-term care

❖ **Health issues specific to the elderly**

Includes initiatives which aim to:

- Research on Alzheimer's and Parkinson's
- Research gerontology leading to products and services to increase the quality of life
- Promote research involving the elderly to define when is important for living well
- Support mental health care, includes support to relatives
- Develop cognitive stimulation programmes
- Develop/fund rehabilitation schemes
- Develop/fund palliative care
- Develop/fund schemes for handicapped retired persons
- Develop/Fund pharmaceutical care services aimed at ensuring that the elderly take their drugs correctly

❖ **Accommodation for the dependent elderly**

Includes initiatives which aim to:

- Fund residential homes and care services
- Develop night care assistance, including on-call professional care worker service
- Support the training of health providers
- Support programmes that give care workers periods of rest and relaxation

PROFILES

ANGLO-GERMAN FOUNDATION FOR THE STUDY OF INDUSTRIAL SOCIETY

YEAR OF 1973

ESTABLISHMENT

PRIMARY ADDRESS

34 Belgrave Square
London, SW1X 8DZ
United Kingdom
Tel.: +44.207.823.1123
Fax: +44.207.823.2324
E-mail: info@agf.org.uk
info@agf.org.uk
Web: www.agf.org.uk

MISSION

To enhance mutual British-German understanding and cooperation in a range of policy areas important in both countries; and to promote best practice in each country by providing access to information, ideas and experience from the other.

BACKGROUND

The Anglo-German Foundation (AGF) was established in 1973 by an agreement between the British and German governments, after a state visit by the late President Heinemann, and incorporated by Royal Charter. For the first five years it was funded exclusively by the German government but since 1979 both governments have contributed to its funds.

GEOGRAPHIC FOCUS

Germany and the UK

PROGRAMME AREAS

The foundation provides project grants for bi-lateral research, seminars and conferences; offers a platform for networking between researchers, managers, trade unions, public servants and journalists in both countries; and publishes and disseminates comparative information and analysis. Activities include:

- Major grants programme
- Minor grants programme
- Exploratory visits programme

Major Grants Programme

From Spring 2005, the foundation is focusing on funding for integrated research initiatives addressing the theme of creating sustainable growth in Europe. Although temporarily suspended, the foundation also provides

grants between £4,000 and £70,000 to projects addressing the following four priority topics:

- Health care systems
- Work-life balance
- Employment and social policies for an ageing society
- Migration and the labour market

Minor Grants Programme

Provides grants between £4,000 and £6,000 for projects in a wider range of fields, such as:

- Employment and unemployment
- Public spending and taxation
- Management and promotion of innovation
- Adjustment to European and global economic change
- The environment

Exploratory Visits Programme

Provides grants up to £500 for travel and subsistence costs for researchers or conference organisers visiting Germany or Britain to develop project ideas with partners in the other country.

AGEING ACTIVITIES

The foundation funds the following initiatives on the theme of employment and social policies for an ageing society:

- Publications
- Events
- Projects

Publications

The foundation's most recent publication is a survey report by Professor Dr Gerhard Naegele of the University of Dortmund and Professor Alan Walker of the University of Sheffield that analyses the situation of seniors and the corresponding policy approaches and research perspectives in the UK and Germany within a comparative framework. In addition, specific fields in need of action in each country are outlined including the current debate about the future of social policy with regard to demographic change.

Events

- Conference 28th –29th October 2004, London UK: to facilitate high profile discussions of the key policy issues

outlined in the survey report. Leading experts from each country discussed the five following topics: Work and employment; Income, poverty and wealth; Health and health care; Long-term care; and societal and political participation

- Expert workshop, May 27th – 28th 2004, Berlin Germany: to discuss – on the basis of a specially commissioned comparative report - how policy makers and practitioners address the challenges arising from demographic changes through better tailored physical fitness programmes for older adults. The workshop focused on design, implementation and evaluation of programmes; best practice in pilot projects; evidence based programmes; strategic partnerships; societal and political participation

Projects

Currently funded projects include

- Job opportunities for whom?: examines employment growth and restructuring in Germany and the UK. The purpose is to use the research to inform current labour market debates which are concerned with raising the employment rate through integration of the non-employed working age population
- Labour market policies for older workers: aims to collect and analyse information about strategies and practices designed to overcome age-barriers in the labour market and to promote retention, reintegration and retraining of ageing workers in the respective countries

APPLICATIONS

Applications should be submitted in the foundation's standard format after discussion with the Secretariat. Decisions on minor grants usually take about a month.

Applications for major grants have to reach the Secretariat at least three months before consideration by the Board of Trustees, which meets in February, June and October. See website for more information.

RESTRICTIONS

The research and events funded by the foundation are usually comparative in nature and carried out or organised jointly by teams in the two countries who submit a single application.

The foundation welcomes co-funded projects. It does not award personal grants or scholarships, nor does it support individuals or organisations.

LANGUAGES ACCEPTED

English and German

TYPE OF FUNDER

Governmentally-linked foundation

LEGAL STATUS

UK registered charity

GOVERNANCE

Board of Trustees

Bryan Rigby, Chair

Prof Dr Carl Christian von Weizsäcker,

Deputy Chair

Simon Broadbent

Prof Wendy Carlin

Lord Douglas Croham

John Edmonds

Prof Robert Leicht

Dr Erika Mezger

Dr Jürgen Oesterhelt

Prof Dr Anita Brigitte Pfaff

Peter von Siemens

Dr Andrew Sentance

STAFF

Dr Ray Cunningham, Director

Regina Vogel, Deputy Director

Ann Pfeiffer, Projects Manager

Annette Birkholz, Press & Publications

Officer and Website Manager

PUBLICATION TYPES

Annual report

Electronic/online information

Information brochures

Newsletter

Publications arising from projects

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	4,162,861	5,883,902
Total Gifts	400,000	565,371
Total Exp.	666,081	941,457
Grants Exp.	274,636	388,178

SOURCES OF FUNDS

The British and German Governments, and investments.

ADDITIONAL ADDRESSES

c/o Alexander von Humboldt Stiftung

Jean-Paul-Straße 12

53173 Bonn

Germany

Tel.: +49.228.8330

Fax: +49.228.83.3199

(Sources of information: Website)

THE ATLANTIC PHILANTHROPIES

YEAR OF 1982

ESTABLISHMENT

PRIMARY ADDRESS

Tara House, 32 Lower Baggot Street
2 Dublin
Ireland
Tel.: +353.1.676.2121
Fax: +353.1.676.3684
E-mail: Ireland@atlanticphilanthropies.org
Web: www.atlanticphilanthropies.org

KEY CONTACT

Colin McCrea, Senior Vice President,
Programmes

MISSION

To bring about lasting changes that will improve the lives of disadvantaged and vulnerable people.

BACKGROUND

Mr. Charles F. Feeney, the co-founder of Duty Free Shoppers Group, Ltd. (DFS), established The Atlantic Foundation, the first of The Atlantic Philanthropies, in 1982. The Atlantic Philanthropies sold their holdings in DFS to LVMH Moët Hennessy Louis Vuitton in 1996. Today, The Atlantic Philanthropies consist of The Atlantic Foundation and The Atlantic Trust, both domiciled in Bermuda; several smaller philanthropies based variously in Bermuda, Great Britain, Ireland, and the United States; and regional service companies that select and evaluate potential grant recipients, oversee grants once awarded, and manage the endowment.

GEOGRAPHIC FOCUS

Bermuda, Ireland, South Africa, UK, US and Vietnam

PROGRAMME AREAS

The Atlantic Philanthropies concentrates its grant investments in four programme fields:

- Ageing
- Disadvantaged children and youth
- Health of populations in developing countries
- Reconciliation and human rights

Ageing

Seeks to improve the lives of older adults and to transform how ageing is viewed and older persons are treated by society.

Disadvantaged Children and Youth

Seeks to bring about lasting improvement in the lives for disadvantaged children and youth; and seeks to demonstrate and communicate that prevention and early intervention are effective in increasing the efficiency of resource allocation; and to support those that speak in the interests of disadvantaged children and youth.

Specifically, the programme focuses on helping build examples of initiatives and services that target youth aged eight to sixteen who are at risk of becoming disconnected from the family, community and educational supports that are crucial to helping them transition to success.

Health of Populations

Supports, develops and builds key institutions of disease prevention and health care systems, with a view to transforming public health and bringing lasting improvement in the health of disadvantaged and vulnerable people. Specifically, the programme focuses on capacity-building within health institutions; and promoting population health reform and preventative behaviour, and a population health approach to vision protection and restoration.

Reconciliation and Human Rights

Seeks to bring about stable, sustainable societies in which disadvantaged and vulnerable people are guaranteed full access to their rights. The programme has two areas of focus with specific goals for each area:

- Building reconciliation in Northern Ireland and South Africa: addresses the legacies of violent conflict that prevent movement toward reconciliation, stability, and the protection of human rights
- Access to justice and public services: addresses the inability of disadvantaged and vulnerable people to access the rights, justice and services to which they are entitled under law

AGEING ACTIVITIES

The Ageing Programme aims to ensure that older adults are treated with dignity and respect, empowered to shape their own destinies, have access to health and support

systems, are represented by a strong cadre of leaders, and are actively contributing their capacities for the good of society. The programme operates in:

- United States
- Republic of Ireland
- Northern Ireland
- Bermuda

United States

The United States programme has two specific objectives:

- Expand the range and improve the quality of volunteer positions, employment, and lifelong learning and consumer education opportunities for older adults so that they can engage in meaningful civic activities
- Enhance health and support services for older adults through human capital development in the key professions that deliver these services, including physicians, nurses, social workers, and direct care workers

Republic of Ireland

The Republic of Ireland programme has three specific targets:

- Improve attitudes of the general public, policymakers, employers, and older adults about ageing and ageism, and improve media portrayals of older persons and ageing
- Enhance health and support services for older adults by developing best-practice models for their chronic care needs.
- Strengthen end-of-life care through expanding palliative and hospice care

Northern Ireland

The Northern Ireland programme works towards:

- Supporting and advancing advocacy efforts on behalf of older adults to eliminate age discrimination, decrease the social isolation and disengagement of rural low-income older adults, and reduce poverty among older adults
- Improving housing for older adults so that it meets the standard of “fit” housing and create best-practice models of independent and supportive housing
- Fostering collaboration and mutual learning between the Republic of Ireland and Northern Ireland through supporting the creation of an All-Ireland Institute of

Ageing, with programmes of education and research emphasising the care and support of older people, as well as other collaborations

Bermuda

The goals for the Bermuda programme are:

- Inventory existing health and support services to determine unmet needs and promote awareness and better coordination of existing services
- Improve both nursing home facilities and home-based support services and their quality of care
- Expand meaningful volunteer opportunities for older adults and increase and improve intergenerational programmes

TYPES OF SUPPORT

Equipment
General support
Loans

APPLICATIONS

Uninvited proposals for funding are currently not accepted. However, the foundation’s funding policies and procedures are currently under revision and once finalised will be posted on its website.

Initial approach by letter.

RESTRICTIONS

Funding is no longer provided for higher education, pre-collegiate education and the non-profit sector.

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

A group of privately funded charitable companies and trusts

GOVERNANCE

Board of Directors

Harvey P. Dale
Christine V. Downton
Charles F. Feeney
John R. Healy
Elizabeth J. McCormack
Thomas N. Mitchell
Frank Mutch
Frank H. T. Rhodes
Frederick A. O. Schwarz, Jr.
Michael I. Sovern
Cummings V. Zuill

STAFF*Executive Management*

John R. Healy, Chief Executive Officer
 David A. Erskine, Chief Investment Officer
 Colin McCrea, Senior Vice-President,
 Programmes
 Deborah R. Phillips, Senior Vice-President,
 Operations
 Alan Ruby, Senior Vice-President,
 Programmes

PUBLICATION TYPES

Electronic/online information
 Financial statements
 Grants lists
 Press releases

FINANCIAL INFORMATION

2003	US DOLLAR	EURO
Total Assets	3,750,000,000	2,763,652,443
Total Gifts	253,820,977	187,059,457
Number of grants:	272	

SOURCES OF FUNDS

Charles F. Feeney

AFFILIATIONS

EFC Member

ADDITIONAL ADDRESSES

The Atlantic Philanthropies (USA) Inc.
 125 Park Avenue, 21st floor
 New York, NY 10017-5581
 United States
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 Fax: +1.212.922.0360

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 Limited*

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 535/2 Kim Ma Street, Ba Dinh District
 Hanoi
 Vietnam

The Atlantic Philanthropies (Seattle) Inc.

203 Parfitt Way SW, Suite 130
 Bainbridge Island
 Seattle, WA 98110
 United States
 Tel.: +1.206.7803410
 Fax: +1.206.780.3409
 E-mail: USA@atlanticphilanthropies.org

(Sources of information: Website)

ATVIROS LIETUVOS FONDAS

YEAR OF 1990

ESTABLISHMENT**PRIMARY ADDRESS**

Didzioji 5
 2001 Vilnius
 Lithuania
 Tel.: +370.5.268.5511
 Fax: +370.2.22.1419
 E-mail: fondas@osf.lt
 Web: www.osf.lt

KEY CONTACT

Diana Vilyté, Executive Director

NAME IN ENGLISH

Open Society Fund Lithuania

MISSION

To make Lithuania open to the world's heritage of culture and knowledge and foster open society by encouraging the embodiment of these ideas and values on an institutional level and by ensuring that no one single body holds a monopoly on power or truth.

BACKGROUND

The Open Society Fund Lithuania (OSFL) was established in Vilnius as one of the many

foundations throughout Central and eastern Europe sponsored by George Soros, the Hungarian-born US financier and philanthropist.

GEOGRAPHIC FOCUS

Lithuania and international

RELATED ORGANISATIONS

Soros Foundations Network

PROGRAMME AREAS

- Education and science
- Civil society
- Public health
- Information

Education and Science

- Centre for Educational Studies: through this centre, the foundation organises seminars and courses for lecturers, postgraduates, doctoral students, and higher education teachers; initiates research on the status of education; collects modern methodological material for education; provides technical and visual aids; and supports projects related to the development of the science of education
- Open Society Institute Network Scholarship programmes: Oxford and Cambridge Universities postgraduate studies and short-term training, Undergraduate Exchange Programme (US), Soros Supplementary Grants and Global Supplementary Grants Programmes are awarded

Civil Society

- Civil Society Programme: supports the cooperation between NGOs, NGO professional development and new initiatives; promotion of the self-government of citizens; strengthening democratic society; and promotion of the development and multiplication of new models of civic activity
- Law Programme: gives support for the legal system in Lithuania; reform of law studies in higher education; legal education of the public; development of the system for legal assistance; and reform of legislation
- East East Programme: a partnership programme aimed at the solution of the regional problems of the countries of Central and eastern Europe and the

Commonwealth of Independent States (CIS). The programme provides opportunities to share experience in resolving urgent social questions of development, to promote social innovation and activism, and to influence local and regional development

Public Health

Supports exchange of information and specialists between medical institutions of the US and Lithuania, and promotes new initiatives. Provides support for doctors to participate in training and conferences; and organises seminars.

Information

The foundation's Library Programme involves promotion and support to the facilitation of libraries; improvement of services to public library users; introduction of new technology and means for disseminating information; cooperation between libraries; and in-service training of staff. Its Publishing Programme includes selection and publication in Lithuanian of the most important works in humanities and social sciences of the 20th century and the classics of philosophical and political thought. The foundation also runs an Internet Programme.

AGEING ACTIVITIES

The foundation is supporting an event entitled 'The Elderly in the New EU', which aims to provide a platform for exchange of experiences among NGOs of and for older people, specifically concerning protection of rights of older people and organizing access to information for older people, to increase public awareness of organizations and associations of older people and to promote participation by older people in social policy debates and public policy formulation.

TYPES OF SUPPORT

Conferences/seminars
Educational/training programmes
Fellowships
Information systems
Professor/faculty development
Publications
Research
Scholarships
Staff development

APPLICATIONS

Application forms are available at the foundation's office in Vilnius and through its website. Applications vary according to the programme and are evaluated by a committee of experts whose recommendations are presented to the board of directors. Approval depends on the quality of the proposal and the extent to which it contributes to the development of an open society in Lithuania.

RESTRICTIONS

No support to political parties, electoral campaigns, or profit-making ventures.

LANGUAGES ACCEPTED

Lithuanian and English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Independent, non-governmental, non-profit organisation

GOVERNANCE

Board

Gintautas Bartkus, Chair

Giedrius Dusevicius

Dalia Micheleviciute

Arunas Poviliunas

Dainius Puras

Sergejus Temcinas

Ramunas Vilpišauskas

STAFF

Diana Vilyté, Executive Director

Gintas Ruibys, Grant Management Director

Julija Motiejuniene, Director of Finance

Laimute Useliene, Accountant

Irena Stravinskaite, Accountant

Gitana Šukaityte, Assistant

PUBLICATION TYPES

Annual report

Electronic/online information

Information brochures

FINANCIAL INFORMATION

2002	US DOLLAR	EURO
Total Exp.	4,273,077	3,149,147

NOTES ON FINANCIAL INFORMATION

OSFL 2002 financial statement

ADDITIONAL ADDRESSES

OSFL Kaunas Centre

Laisves av. 53

3000 Kaunas

Lithuania

(Sources of information: EFC membership application form; Website)

BALANCE CHARITABLE FOUNDATION FOR UNCLAIMED ASSETS

YEAR OF 2003

ESTABLISHMENT

PRIMARY ADDRESS

9 Red Lion Court

London, EC4A 3EF

United Kingdom

Tel.: +44.207.936.4333

Fax: +44.207.936.4343

E-mail: info@balancefoundation.org.uk

Web: www.balancefoundation.org.uk

KEY CONTACT

Richard Compton-Burnett, Director of Development

MISSION

To utilise unclaimed assets for the public good.

BACKGROUND

The Balance Charitable Foundation was established in December 2003 as a charitable organisation and plays two distinct roles. It works with financial institutions, which are the current holders of unclaimed assets, their advisors, authorities and industry bodies in order to secure the release of the unclaimed assets and acts as an independent grantmaking foundation utilising those assets that are released to the BCF.

If monies are released to charity under this initiative, the contractual rights of the owners of assets will be unaffected. In order to provide further protection to any owners of these assets who do come forward, it is intended that participating financial institutions will deduct a small percentage from the monies released to charity and use that money to purchase adequate insurance. The Balance Charitable Foundation has worked with Willis, the global insurance broker, and underwriters at Lloyd's have agreed to offer the proposed insurance, which should be available on practical terms and be valid in perpetuity.

As and when the BCF grows in terms of financial resources and staffing, it intends to expand upon its initial areas of activity. For example, it will explore the development of a loans and venture philanthropy programme which would provide direct support to charities to increase their effectiveness and performance.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

Helps to address the needs of the disadvantaged and vulnerable in UK society by considering applications for funds from relevant charities. Initially, the priority area for grantmaking will be the disadvantaged and vulnerable older people over 75. This has been identified as a priority because the foundation's funds partly will come from assets unclaimed by older people or the deceased, and because of the well-documented need of support by large sections of the UK's ageing population. The foundation is interested in applications which focus on older people, over 75 in particular, and include the following criteria:

- New approaches to service delivery
- Issues facing carers
- Approaches to combating isolation, such as befriending schemes
- The provision of information or advice
- Local advocacy initiatives
- Innovative caring and housing solutions
- Credit action schemes in local community organisations

Widespread consultation with the charitable sector has already been undertaken and a range of valuable insights from this are reflected in the Foundation's plans and approach.

Underpinned always by the highest standards of governance and financial prudence, the BCF will:

- Be proactive as well as responsive in its areas of interest, and adopt a more entrepreneurial and risk-taking approach than has become the norm in the grant making sector
- Consider making grants over longer periods of time than is usual in the charitable sector
- Consider applications which include core funding – something many grant making bodies often do not support
- Allocate its funds in a way which is additional to, and not a substitute for, statutory funding
- Actively encourage applications which may appear to be for 'difficult' causes
- Operate an inclusive and consultative style of grant making with a simple two

stage application process and clear straightforward criteria

- Draw widely upon professional expertise from its unique access to partners in the financial as well as the charitable sector.

The foundation will use its independence to ensure that its approach is distinctive and complementary to the various highly respected national, regional and local charities operating in its areas of interest.

TYPES OF SUPPORT

Capital support

Continuing support

General support/general purposes

APPLICATIONS

Trustees are particularly, but not exclusively, interested in:

- Work which shows real evidence of intergenerational and wider community involvement, possibly through joint working with other charities
- The participation of older people in the design and running of the proposed work

The BCF is also open to applications for other projects concerned with older people which are particularly innovative but outside the criteria above.

The trustees are willing to consider applications which include a realistic element of the applicant organisation's core costs, but they will not fund full cost recovery.

Applications are eligible from charitable or voluntary organisations working in the UK, and from constituted nonprofit organisations working for public benefit. Partnership applications are welcomed. The BCF will not support work which is a statutory responsibility. Applications will be considered from £50,000 to £100,000, phased over up to five years.

In the first instance, an outline letter of not more than 2 sides of A4 paper should be sent, which:

- Summarises the work for which funding is required
- Shows clearly how the work meets the BCF's criteria
- Describes the role of the applicant organisation
- Gives the proposed total budget figure for the project

The BCF must receive the letter no later than Tuesday, 31st May 2005. Outline letters will

not be accepted by fax or email. Applicants will receive a response by June 30th, letting you know whether you are invited to make a full application. For details of how to make a full application, the website should be consulted.

Initial approach by letter.

RESTRICTIONS

The BCF will not support applications which are for: general appeals or endowments, work outside the UK, replacement for statutory funding, capital projects, support for individuals, the promotion of religious or political causes, retrospective funding, websites or research.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered Charity No. 1101333

GOVERNANCE

Trustees

Lord Leitch, Chair

Michael Webber, Deputy

Sir David Cooksey

Piers Le Marchant

Judith Portrait

Maggie Semple

STAFF

Richard Compton-Burnett, Director of Development

Patricia Lankester, Director of Grant Making

Sarah Humphries, Project Consultant

Lawrence Barber, PA

PUBLICATION TYPES

Application guidelines

Electronic/online information

Press release

(Sources of information: Website)

BERTELSMANN STIFTUNG

YEAR OF 1977

ESTABLISHMENT

PRIMARY ADDRESS

Carl-Bertelsmann-Strasse 256

Postfach 103

33311 Gütersloh

Germany

Tel.: +49.5241.81.81.160

Fax: +49.5241.81.68.1396

E-mail: info@bertelsmann-stiftung.de

Web: www.bertelsmann-stiftung.de

KEY CONTACT

Prof Dr Heribert Meffert

NAME IN ENGLISH

Bertelsmann Foundation

MISSION

To perceive problems within society, to help solve them by developing exemplary models with experts from practical and theoretical fields, and to put these models into effect in society.

BACKGROUND

The Bertelsmann Foundation was established in 1977 by Reinhard Mohn, who in 1993 transferred 68.8% of the capital shares in the Bertelsmann Corporation as non-voting shares to the foundation. The foundation conducts its non-profit-making activities in the philanthropic traditions of the founder families, Bertelsmann and Mohn. The Bertelsmann Foundation's share in Bertelsmann AG is currently 57.6%. The Bertelsmann Foundation does not exercise any direct voting rights in conjunction with its share in Bertelsmann AG. On July 1st, 1999, the sole voting rights of Reinhold Mohn were transferred to the Bertelsmann Verwaltungsgesellschaft (BVG, the Bertelsmann Management Company). The BVG controls 75% of the voting rights in the general shareholders' meeting of the Bertelsmann AG. The remaining 25% belongs to the Groupe Bruxelles Lambert of Belgium.

GEOGRAPHIC FOCUS

International

RELATED ORGANISATIONS

Bertelsmann AG

PROGRAMME AREAS

The foundation generally initiates and carries out projects itself, working with partners in business, government and private institutions. The foundation focuses on the following:

- The Carl Bertelsmann Prize
- Economic and social affairs
- International relations and politics
- Cultural affairs
- Medicine and health care
- Philanthropy and foundations
- Education

The Carl Bertelsmann Prize

This annual prize of 150,000 euros aims to provide new impetus to public and political discussion. It is awarded for innovative solutions or for exemplary models in socio-political problem areas.

Economic and Social Affairs

Seeks to develop approaches to pressing social problems, to advance the social market economy, and to promote cooperative dialogues within the economic sector. It also aims to multiply the tools of collective bargaining through the development of exemplary concepts and methods that aim to overcome traditional opposition between capital and labour, and to develop up-to-date management and organisational structures within companies. It also strives to improve the elements and instruments of corporate cultures based on partnership.

International Relations and Politics

Aims to support dialogue, cooperation and mutual learning between people of different countries and cultures; and to identify and anticipate new kinds of problems and formulate timely, innovative approaches to finding solutions. It also aims to improve political institutions, structures and processes through the design of rational models and support for implementation.

Cultural Affairs

Seeks to support talented young artists. For example, the foundation supports New Voices, which is an international singing contest that has been held since 1987. In the Forums for Culture, the foundation organises cross-cultural encounters and dialogues about cultural issues of our time and across cultural borders.

Medicine and Health Care

Supports measures that benefit prevention, education, therapy and the practical work of doctors. The foundation gives priority to areas receiving insufficient attention from the public health service and the medical establishments. Initiatives that contribute to controlling costs within the health service are encouraged.

Philanthropy and Foundations

Aims to increase the professionalism of the management, strategies and methods of foundations; to examine their effectiveness and legitimacy; to promote cooperation among foundations; and to support the establishment of new ones.

Education

Aims to significantly improve the quality of Germany's educational system. To achieve this goal, the foundation is promoting the holistic understanding of education; a performance-based approach within educational institutions; and the integration of immigrants. With this in mind, the foundation is joining forces with partners to develop criteria for assessing the quality of educational institutions and ingraining the necessity of infant education in society.

AGEING ACTIVITIES

The foundation is currently operating the following projects:

- Demographic change campaign
- Living and housing for seniors
- Expert commission on senior citizen policy
- Ageing workers in the labour market
- Pension reform

Demographic Change Campaign

Endeavours to counter grim scenarios of an aged, futureless society with a more optimistic perspective by contributing to formulating strategies at the local and regional levels as well as among policymakers at the state and federal levels. These strategies comprise developing new positive views on ageing; new models for work participation; and tapping into senior citizen's high productivity potential. In addition, the foundation has published a handbook to help communities evaluate and develop ideas and practical strategies for taking action. The campaign places special emphasis on identifying successful ideas at

the local level for policy issues pertaining to senior citizens, since integrated approaches have been lacking for establishing social environments that promote their well-being or provide them with opportunities for helping themselves. At state and federal levels, the campaign strives to establish a catalogue of demographic indicators and make them public, as a way of boosting both transparency and knowledge of the consequences of demographic development among policymakers and the public at large.

Living and Housing for Seniors

This project is designed to provide a systematic summary of new forms of housing. To this end, initiatives responding to current housing needs are assessed and further developed, information on best practice models is publicised and findings from other international projects are examined and integrated. Together with the Kuratorium Deutsche Altershilfe (German Foundation for the Care of the Elderly), the Bertelsmann Stiftung is developing alternatives to living in traditional nursing or senior citizens' facilities. Through workshops, studies and round-table discussions, the foundation is searching for approaches that meet the needs of the elderly while taking future social and economic changes into account.

Expert Commission on Senior Citizen Policy

Funds an interdisciplinary commission of experts that is assigned the task of formulating strategic policy recommendations for political action. The commission is conducting an empirical assessment to facilitate the compilation and exchange of knowledge and expertise. In the second phase, it will develop methods for improving the lives of seniors, including models for preventative treatment, geriatric rehabilitation and nursing care. These efforts are meant to define new and modern approaches to age and ageing, along with appropriate project initiatives. The commission's experts come from the fields of gerontology, medicine (geriatrics, gerontopsychiatry), education, nursing, philosophy, psychology, law, sociology and economics. In addition, the commission includes representatives from industry associations and interest groups, as well

as public administrators and political leaders.

Ageing Workers in the Labour Market

Examines labour policies and conditions in countries with higher employment rates for older workers, and formulates recommendations to provide Germany's lawmakers, unions and management with possible strategies for action. Results of the analysis and recommendations are summarised in the publication "Beschäftigungs- chancen für ältere Arbeitnehmer." In addition, strategies were also identified for promoting equitable personnel policies for older workers and published in a brochure entitled "Erfolgreich mit älteren Arbeitnehmern." The foundation's project was part of the EU initiative "Proage—Facing the challenge of demographic change" and was carried out under the auspices of the Confederation of German Employers' Associations.

Pension Reform

Seeks to develop pragmatic solutions for expanding the regulatory framework for private and corporate pensions, with the goal of achieving a higher quality and broader distribution of supplemental pension plans. In view of shortfalls in the state pension system, the need for private and corporate plans will grow in order to compensate for lower state-based benefits.

TYPES OF SUPPORT

- Awards/prizes
- Conferences/seminars
- Curriculum development
- Funder-operated programmes
- Information systems
- Research
- Staff development

APPLICATIONS

The foundation is not a grantmaking foundation. It designs and initiates its own projects and develops them through practical implementation.

RESTRICTIONS

Foreign projects must involve cultural, scientific or social benefits for Germany.

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Independent foundation organised under private law with registered offices in Gütersloh

GOVERNANCE

Executive Committee

Prof Dr Heribert Meffert, Chair
Hans D. Barbier
Werner J. Bauer
Ernst Buschor
Hubertus Erlen
Caio Koch-Weser
Johannes Meier
Liz Mohn
Reinhard Mohn
Dieter Stolte
Rita Süssmuth
Gunter Thielen
Werner Weidenfeld
Gerhard Zeiler
Klaus Zumwinkel

STAFF

Prof Dr Heribert Meffert, Chair
Liz Mohn, Vice-Chair
Johannes Meier
Reinhard Mohn
Werner Weidenfeld
280 full-time staff

PUBLICATION TYPES

Annual report
Newsletter: 'Topics'
Project-related works

FINANCIAL INFORMATION

	2002	EURO	EURO
Total Assets	736,000,000	736,000,000	
Total Exp.	62,962,000	62,962,000	
Programme Exp.	49,938,000	49,938,000	

SOURCES OF FUNDS

Income on endowment and return on Bertelsmann AG stock, donations from the Bertelsmann Group of Companies and from other private and public funders.

NOTES ON FINANCIAL INFORMATION

Accounting year runs from 2001 to 2002.

AFFILIATIONS

Bundesverband Deutscher Stiftungen
Council on Foundations
EFC Funding Member

(Sources of information: Website; Annual Report 2002; Verified by funder)

BIG LOTTERY FUND

YEAR OF 2004

ESTABLISHMENT

PRIMARY ADDRESS

1 Plough Place
London, EC4A 1DE
United Kingdom
Tel.: +44.207.211.1800
Fax: +44.207.211.1750
E-mail:
general.enquiries@biglotteryfund.org.uk
Web: www.biglotteryfund.org.uk

KEY CONTACT

Stephen Dunmore, Chief Executive

MISSION

To enable others to make real improvements to the lives of disadvantaged people and the well-being of communities, through fair and open funding of people, projects and programmes.

BACKGROUND

The Big Lottery Fund is a single new lottery distributor created by merging the New Opportunities Fund and the Community Fund. Launched on 1 June 2004, the Big Lottery Fund will build on the experience and best practice of both organisations to simplify funding in those areas where the two bodies currently overlap, and to ensure lottery funding provides the best possible value for money.

GEOGRAPHIC FOCUS

UK

FORMER NAME

The Community Fund (National Lottery Charities Board) / The New Opportunities Fund

PROGRAMME AREAS

The Big Lottery Fund brings together the objectives of the Community Fund, a provider of funding for charities and the voluntary and community sectors, and the New Opportunities Fund, which provides funding for health, education and environment projects. The fund takes over the Millennium Commission's role in supporting large-scale regeneration projects. Half of the funding that the Lottery raises for good causes – currently around £600 million each year – will be distributed by the Big Lottery Fund.

Programme areas include the following:

- Community learning and creating opportunity
- Promoting community safety and cohesion
- Promoting well-being

AGEING ACTIVITIES

Mentro Allen

This programme aims to make the less active population of Wales, including the elderly, more active by increasing their recreational use of Wales's natural environment. It will pay for schemes that will make the parks, waterways, coasts and countryside more accessible to people who might otherwise never use them.

TYPES OF SUPPORT

Grants

APPLICATIONS

Various application procedures for each programme area. Contact the organisation or visit their website for more details.

RESTRICTIONS

See individual programme details (on website), restrictions vary.

LANGUAGES ACCEPTED

English/Welsh

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Non Departmental Public Body

GOVERNANCE

Prof Sir Clive Booth, Chair
Dame Valerie Strachan, Vice Chair

STAFF

Stephen Dunmore, Chief Executive

PUBLICATION TYPES

Annual report
Application guidelines
Various others, see website for details

(Sources of information: Website; Verified by funder)

BRIDGE HOUSE ESTATES TRUST FUND

YEAR OF 1995

ESTABLISHMENT

PRIMARY ADDRESS

Corporation of London
P.O. Box 270
Guildhall
London, EC2P 2EJ
United Kingdom
Tel.: +44.20.7332.3710
Fax: +44.20.7332.3720
E-mail:
bridgehousetrust@corpoflondon.gov.uk
Web: www.bridgehousegrants.org.uk

KEY CONTACT

Clare Thomas, Chief Grants Officer

MISSION

To support effective charitable activity across Greater London, through an objective and quality grantmaking operation, in a number of clearly defined priority areas.

BACKGROUND

The Bridge House Estates Trust Fund's origins can be traced back to 1097 when taxes were raised to repair London Bridge. By the end of the 12th century, a significant fund had begun to accumulate due to the taxes, rents and bequests collected. The trust's grantmaking arm began supporting charitable activity benefiting the inhabitants of Greater London in 1995.

GEOGRAPHIC FOCUS

Greater London

RELATED ORGANISATIONS

Corporation of London

PROGRAMME AREAS

For many centuries, the core business of the trust has been the building and maintenance of bridges across the River Thames into the City of London. The maintenance and eventual replacement of these bridges remains the prime objective of the trust. However, the trust is now able to release considerable surplus funds in support of the second key area of Bridge House Estates' work, namely the provision of vital assistance to charitable organisations across Greater London. The focus of the grants for 2002-3 includes:

- Transport and access for older and disabled people

- Environmental conservation
- Children and young people
- Technical assistance
- Older people in the community
- Small grants scheme

Transport and Access for Older and Disabled People

Aims to remove barriers, physical or otherwise, that prevent disabled people and older people from accessing services and participating as equal citizens. This programme comprises three themes:

- Access to transport: includes grants to enable charities to provide transport each day for their service users
- Access to buildings: includes grants to community facilities and arts venues to improve their accessibility in accordance with the Disability Discrimination Act of 1995
- Access to opportunities: includes grants to charities to provide training and support for independent living skills for people with disabilities

Environmental Conservation

Works to diminish London's environmental problems, which include pollution levels, traffic congestion, energy consumption and sub-standard housing with its attendant social problems.

Children and Young People

Supports children and young people through three programmes:

- Prevention: includes grants to organisations that provide support for parents; assists mothers on drug rehabilitation programmes; supports and heals children living in refuges as a result of domestic violence; and promotes emotional literacy in children
- Active involvement: engages young people in their communities and interests them in social issues and civil processes
- Young people in crisis: includes funding projects that tackle homelessness, substance abuse, racism and social exclusion

Technical Assistance

Helps voluntary sector organisations develop and retain the skills necessary to deliver quality services to local people.

Older People in the Community

Provides grants to support a wide range of activities that enable older people to take an active part in their communities and enjoy life to the full.

Small Grants Scheme

Provides small grants in a variety of areas to grass-roots organisations to enhance community spirit and improve communities.

AGEING ACTIVITIES

Under its priority Older People in the Community, the foundation seeks to improve the quality of life of older Londoners, particularly those disadvantaged by ill health or poverty and to enable older people to take a full and active part in society. Grants are made in three key areas:

- Active ageing
- Reducing isolation
- Enriching life in residential care

Active Ageing

Supports projects that seek to engage older people in volunteering; maintain or improve health and fitness; tackle poverty among older people, particularly through benefits and housing advice; and provide cultural, educational and social stimuli.

Reducing Isolation

Funds projects that provide older people with advice, information and advocacy; undertake outreach to isolated older people; tackle isolation by means of providing transport; and provide social and leisure opportunities.

Enriching Life in Residential Care

Provides support to initiatives that enable those in residential care to participate in the wider community; provide creative opportunities and social stimuli; and advocate for improved standards of residential care, particularly for marginalised groups.

TYPES OF SUPPORT

Building/renovation
 Educational/training programmes
 Equipment
 Funder-operated programmes
 General support/general purposes
 Staff development
 Technical assistance

APPLICATIONS

Grantseekers must apply for funding using the trust's own application form, which can

be obtained by request. Applications from unincorporated bodies, unless a registered charity has agreed to receive and account for any grant that may be awarded, will not be considered. Applications must be posted and will not be considered if transmitted by fax or e-mail. Applications will be considered by the Trust Fund Committee. An assessor may need to visit the applicant organisation.

RESTRICTIONS

The trust does not fund political parties; political lobbying; non-charitable activities; statutory or corporate bodies where the body involved is under a statutory or legal duty to incur the expenditure in question; or grants which do not benefit the inhabitants of Greater London. Does not fund individuals; grantmaking bodies to make grants on its behalf; schools, universities or other educational establishments except where they are undertaking ancillary charitable activities specifically directed towards one of the agreed priority areas; medical or academic research; churches or other religious bodies where the money will be used for construction, maintenance and repair of religious buildings and for other religious purposes; or hospitals.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Governmentally-linked foundation

LEGAL STATUS

Trust registered with the charity commission

GOVERNANCE

Grants Committee

Patrick Roney, Chair

William Fraser, Deputy Chair

Richard Agutter, Alderman

Sir Alan Traill, Alderman

Wilfred Archibald

John Barker

John Bird

Michael Cassidy

Antony Eskenzi

William Fraser

John Holland

Joyce Nash

Barbara Newman

Richard Scriven

STAFF

Sandra Davidson

Pat Edwards

Jenny Field
Stewart Goshawk
Emma Le Poidevin
Sara Llewellyn
Muriel Lobo
Ciaran Rafferty
Tebs Rashid
Valerie Stapley
Clare Thomas
13 full-time staff
2 part-time staff

PUBLICATION TYPES

Annual report
Application guidelines
Electronic/online information
Information brochures

FINANCIAL INFORMATION

2001	POUND STERLING	EURO
Total Assets	600,996,000	849,464,311
Total Exp.	27,316,000	38,609,187
Grants Exp.	15,723,698	22,224,308
Programme Exp.	2,912,000	4,115,901
Number of grants:	521	

SOURCES OF FUNDS

Property rents and invested monies.

NOTES ON FINANCIAL INFORMATION

For the financial year ended March 31st 2001.

AFFILIATIONS

Association of Charitable Foundations

(Sources of information: Annual Report 2001; Application guidelines; Information brochures; Website; Verified by funder)

CARNEGIE UNITED KINGDOM TRUST

YEAR OF ESTABLISHMENT 1913

PRIMARY ADDRESS

Comely Park House
Dunfermline
Fife, KY12 7EJ
United Kingdom
Tel.: +44.138.372.1445
Fax: +44.138.362.0682
Web: www.carnegieuktrust.org.uk

KEY CONTACT

Charlie McConnell, Chief Executive

MISSION

To support research, public policy analysis and grassroots social action initiatives

through non-partisan activities dedicated to achieving practical results in people's lives.

BACKGROUND

Founded in 1913, the Carnegie United Kingdom Trust was established as a think-tank and grantmaker in the UK and Ireland. The trust is one of 25 worldwide from the USA to Russia, that were either directly established by Andrew Carnegie or have developed since. The Carnegie UK Trust has links with the network of sister trusts, one example being through co-organising the international Carnegie Medal for Philanthropy.

GEOGRAPHIC FOCUS

International

PROGRAMME AREAS

The trust has a commitment to supporting think-tank research and policy analysis leading to strategic change at national level, as well as providing grants for grassroots projects.

Since 1989, the trust has supported five think-tank initiatives:

- The Carnegie Third Age Programme
- The Carnegie Young People Initiative
- The Volunteer Development in Independent Museums initiative
- The Voluntary Arts Network
- The Carnegie Commission on Rural Community Development

The trust runs the following grant initiatives:

- Young Peoples Grant: to encourage young people to take an active part in decision-making in their communities and encourage wider participation in society
- Rural Community Development Grant: to help rural communities to initiate positive change

AGEING ACTIVITIES

The Carnegie Third Age Programme, which the trust has established 1989, aims to improve the quality of services for older people locally and to enhance the interests of older people generally across public policy.

Since 1992, the trust's grass roots grants reinforced strategic developments.

The trust has also produced a number of publications on the topic including:

- Potential of a Lifetime
- Third Age Volunteering Report.

- Age and Employment. Why Employers should think again about older workers.
- The Third Age: Final Inquiry Report: Life, Work and Livelihood in The Third Age
- The Third Age: Irish Report - Irish Perspective in The Third Age

TYPES OF SUPPORT

Programme development

Research

APPLICATIONS

Application is by letter; the trust does not currently accept applications through e-mail. See website for details.

Initial approach by letter.

RESTRICTIONS

Does not support general appeals; closed societies; endowment funds; debt clearance; individuals and private companies; replacement of statutory funding; purchasing of land; purchasing and restoration of buildings; formal education, schools, colleges or universities; libraries; individuals for personal study, travel or expeditions; animal welfare; sports and recreation; holidays and adventure centres; conciliation and counselling services; care in the community; pre-school groups and play schemes; residential care and day-care centres; arts centres, professional arts companies and festivals, performances and workshops; and pipe organs.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

GOVERNANCE

Board of Trustees

William Thomson, Chair

Urmila Banerjee, Vice-Chair

James Doorley

Dr David M Fraser

Lady Anthony Hamilton

Angus Hogg

Jeremy Holmes

Paddy Linaker

Bill Livingstone

Bhupendra Mistry

Tony Pender

J. Douglas Scott

Dr David B. B. Smith

David J. Stobie

Robin W. Watson

C.R. Woodrow

STAFF

Charlie McConnell, Chief Executive
Robert Bell
Kate Braithwaite
Abi Carter
Terry Clark
Raji Hunjan
Angela Manson
Janine McEwan
Rehema Shabaya
Lucy Smith
Donna Sullivan
Mahpara Thompson
Hilary Webb
14 full-time staff

PUBLICATION TYPES

Annual report
Electronic/online information
Grants list
Information brochure
Publications catalogue/list

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	30,362,344	42,914,974
Total Gifts	90,646	128,122
Total Exp.	1,602,587	2,265,141
Programme Exp.	1,255,628	1,774,739

SOURCES OF FUNDS

Investment income, donations, gifts and legacies.

ADDITIONAL ADDRESSES

'Carnegie Young People Initiative'
Third Floor, Downstream Building
1 London Bridge
London, SE1 9BG
United Kingdom
Tel.: +44.845.456.1697
Fax: +44.845.456.1698

(Sources of information: Website)

CENTRICA PLC

FUNDING SINCE 1997

PRIMARY ADDRESS

Millstream, Maidenhead Road, Windsor
Berkshire, SL4 5GD
United Kingdom
Tel.: +44.20.8658.8259
E-mail: community@centrica.co.uk
Web: www.centrica.co.uk

KEY CONTACT

Community Relations Administrator

MISSION

To help older people and those with disabilities and their carers; to address energy efficiency and fuel poverty; and to support charities and local voluntary groups and education.

BACKGROUND

Centrica plc is a provider of energy and other essential services at home and abroad. In 1997, Centrica plc was formed as a result of a merger of British Gas plc into Centrica plc and BG plc.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

The company provides funds in the areas of the elderly, the disabled, charities and education through the following programmes:

- Help the Aged
- National Energy Action
- Family Welfare Association
- Carers UK
- New Deal for Disabled Programme
- Breathing Life
- Motor Trades Benevolent Association
- British Gas/NCVO Sustainable Funding
- Cardiff Volunteering Initiative
- Upstart Awards with the New Statesman
- AA Accessible Hotel of the Year

Help the Aged

Centrica has joined forces with Help the Aged and works together to help older people fight fuel poverty and isolation.

National Energy Action

Centrica works with National Energy Action and supports a range of projects encouraging the efficient use of energy, delivering tangible benefits to low-income families.

Family Welfare Association

Funds the charity Family Welfare Association to help children and families in need through practical support; counselling; advice and financial help; community mental health projects and educational grants advice.

Carers UK

Supports projects to help people who take care of a relative or friend who is not able to live alone because of sickness, age or disability.

New Deal for Disabled Programme

Works with Carers UK, Jobcentre Plus and Employers' Forum on Disability and other partners to support programmes that help provide job opportunities for people with disabilities.

Breathing Life

Funds equipment; treatment and research for a cure for cystic fibrosis.

Motor Trades Benevolent Association

Supports projects to help men, women and children from the motor trade industries.

British Gas/NCVO Sustainable Funding

Funds projects with the National Council for Voluntary Organisations to provide advice and information to help voluntary and community organisations help themselves to become more financially stable, promoting thorough internal planning, grant-income diversification and earned-income generation as three key means of developing a more sustainable funding future.

Cardiff Volunteering Initiative

Organises a volunteering project involving 200 employees. The project aims to provide a wider range of measurable staff development opportunities in both a working and a non-working environment; to use volunteering to provide further means for staff to access development opportunities within the organisation; to increase the profile of individual and affiliated charitable organisations; and to provide a flexible portfolio of charitable organisations that could be supported to suit staff preferences.

Upstart Awards with the New Statesman

Supports 'social entrepreneurs', individuals who are seeking to develop innovative community programmes to benefit local communities.

AA Accessible Hotel of the Year

Aims to highlight the importance of ensuring equal access for disabled people at hotels, B&B and guest accommodation.

AGEING ACTIVITIES

In January 1999, British Gas joined forces with Help the Aged in a major partnership to address three issues for older people: fuel poverty, isolation and home security.

A multi-award winning scheme, taking the Business in the Community Cause Related Marketing Award for Excellence 2002, the Partnership continues to develop and implement practical schemes to improve the lives of older people across the Britain.

TYPES OF SUPPORT

Awards/prizes
Curriculum development
Educational/training programmes
Employee volunteering/technical assistance
Equipment
General support/general purposes
Programme development
Research
Staff development

RESTRICTIONS

No support is given to individuals; animal welfare organisations; building projects; political or denominational groups; arts or sports bodies. Generally does not support requests for advertising or sponsorship unless part of a project in which the company is already involved.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Direct corporate citizenship programme

PUBLICATION TYPES

Annual report
Electronic/online information

AFFILIATIONS

London Benchmarking Group

(Sources of information: Annual Report 2001; Website)

CHARLES HAYWARD TRUST

YEAR OF 1961

ESTABLISHMENT

PRIMARY ADDRESS

Hayward House,
45 Harrington Gardens
London, SW7 4JU
United Kingdom
Tel.: +44.207.370.7063
Web: www.charleshaywardfoundation.org.uk

KEY CONTACT

David Brown, Administrator

MISSION

To help the community through promoting medical research, welfare of the elderly, special needs, young people at risk, conservation and preservation.

BACKGROUND

The Hayward Foundation was set up in 1961 in accordance with the wishes of Sir Charles Hayward. In 1911 he started his own business making wooden patterns for the developing engineering trade. His early involvement in the motor industry proved to be the springboard for his later success, culminating in the formation of Firth Cleveland Ltd. Sir Charles used his personal fortune to establish and endow two charitable trusts.

GEOGRAPHIC FOCUS

UK and overseas

PROGRAMME AREAS

The trust concentrates its grant making on the following:

- Art, preservation and the environment
- Community facilities
- Older people
- Medical research
- Early intervention
- Hospices
- Criminal justice
- Overseas
- People with disabilities
- Youth at risk

Art, Preservation and the Environment

Focuses on the conservation and preservation of pictures, manuscripts and artefacts; the purchasing of land or reclaiming recently purchased land to be used for nature reserves or inner-city gardens, parks etc., where these

will be maintained in perpetuity; industrial heritage; and the conservation of gardens

Community Facilities

Supports a limited number of projects providing community facilities and services that meet basic needs and accommodate new programmes of social inclusion and participation. The trust may cover the capital costs of community centres and village halls, community facilities provided by churches and faith groups, and rescue organisations.

Older People

Funds projects that seek to improve quality of life, particularly those which take a creative approach to doing so. Other funding priorities include the expansion or improvement of older persons' care homes, sheltered and supported accommodation; support for older people in the community - advice and help lines, home maintenance schemes and home care, respite care homes and luncheon clubs; informal day care or social and recreational activities - except those contracted by government; and schemes to alleviate isolation and depression in older people. Where it has been shown that some older people from some ethnic groups do not receive the services they need, the trust may seek to redress this balance.

Medical Research

Focuses on near-patient based research, which can show an immediate benefit to patients and is of direct clinical relevance. The trust also considers bioengineering projects of immediate benefit to quality of life as well as research on what works in preventative health or complementary medicine.

Early Intervention

Provides financial assistance to projects offering services to families; support for parenting; services for children; help for families suffering from domestic violence; support for families in temporary accommodation; and early substance abuse prevention, diet and safety programmes.

Hospices

Covers the capital costs of day care, domiciliary care and training within hospices. The trust may also provide start-up project funding for new hospice or domiciliary services in new areas. Children's' hospices are now included.

Criminal Justice

Funds alternatives to custody; victim support services; schemes to help prisoners maintain links with their families and be better parents; accommodation and support for offenders on release; rehabilitation of offenders. The trust will also continue to occasionally fund prison reform activities.

Overseas

Accepts applications for projects in the undeveloped world. The trust favours high impact projects that have immediate results. It only funds overseas projects through UK registered charities, which must be able to provide an adequate local monitoring function for the grant. Funding priorities include:

- Clean water and sanitation
- Basic health education programmes
- Cure and rehabilitation from disease and disability
- Youth at risk, orphans, street children
- Basic training in farming skills and income generation

People with disabilities

Funds organisations that support those with physical and learning disabilities, where the services provided are not a statutory duty; charities providing advice and support for those with rare or marginalised conditions; capital costs of non-educational aspects of special schools; and training establishments and sheltered employment for people with disabilities.

Youth at risk

Provides funding for crime prevention schemes; diversionary projects; youth mentoring programmes; community service and volunteering; remedial education; employment; youth work; uniformed organisations in areas of high socio-economic deprivation; integrated housing, support and training projects for young people at risk (Foyers); and programmes to promote responsibility in young people at risk.

In addition to its main programme areas, the trust may consider projects outside its main areas of interest when such projects develop novel interventions into society's ills or address causes which are rare or unpopular.

TYPES OF SUPPORT

Capital support

Programme development

Research

APPLICATIONS

There is no application form. Initial application should be made in writing to the Administrator, David Brown. A list of what should be provided is available from the trust's website. Applicants may add any enclosures that help to describe their organisation or the project. They will be advised whether more information is required.

All applications will receive an acknowledgement. However, as there is often a waiting list, and the trustees meet only four times a year to consider applications, applicants may have a wait of several months before you receive a decision. On average, trustees approve one in twenty applications. Applicants are advised to read the guidelines available from the trust's website very carefully, as inappropriate applications waste time.

RESTRICTIONS

Does not fund academic chairs; animal charities; bursaries; church restoration; computers; education; endowment funds; environmental and animal sciences; fund-raising activities; general repairs; non-medical academic research; paying off loans; revenue funding of core costs, general funding, continuing funding and replacement funding; replacement of government or lottery funding or activities primarily the responsibility of central or local government or some other responsible body; expenditure that has already been incurred or will have been incurred by the time the application can be considered by our trustees; travel, outings and holidays.

TYPE OF FUNDER

Independent foundation

PUBLICATION TYPES

Electronic/online information

Grant application guidelines

(Sources of information: Website; Grant application guidelines)

THE COMMUNITY FOUNDATION FOR NORTHERN IRELAND

YEAR OF 1979

ESTABLISHMENT

PRIMARY ADDRESS

Community House, Citylink Business Park,
Albert Street
Belfast, BT12 4HQ
United Kingdom
Tel.: +44.289.024.5927
Fax: +44.289.032.9839
E-mail: info@communityfoundationni.org
Web: www.communityfoundationni.org

KEY CONTACT

Avila Kilmurray, Director

MISSION

To improve the quality of life for the people in Northern Ireland and help communities tackle social needs and divisions.

BACKGROUND

The Northern Ireland Voluntary Trust was established in 1979 by a number of community activists who lobbied the then Labour Government to take a more active role in supporting social action and community development in Northern Ireland. In 2001, the trustees changed the name of the organisation to The Community Foundation for Northern Ireland, becoming one of 62 community foundations in Britain and Ireland, and part of a growing network around the world.

GEOGRAPHIC FOCUS

Northern Ireland

FORMER NAME

Northern Ireland Voluntary Trust

PROGRAMME AREAS

The foundation concentrates on three areas of work: supporting ethnic minorities, women and young people; strengthening and building communities; and building a stable and enduring peace. The foundation funds the following grant programmes:

- Community arts
- Creating common ground
- Investing for healthier communities
- Social Justice Initiatives Fund
- Telecommunity
- Ulster Bank Sir George Quigley Award Fund

- You and Your Community Millennium Awards
- YouthBank

Community Arts

Supports projects dealing with innovative and creative ways to approach peace-building.

Creating Common Ground

Participates in the New Opportunities Fund's first environmental programme called 'Green Spaces and Sustainable Communities Programme'. Focuses on areas of high social need and encourages work with local people to engage in issues of community safety; community development; improvement of the natural and living environment; community relations; and building community infrastructure.

Investing for Healthier Communities

Aims to assist local community groups and interest-based groups who need additional resources in order to help improve the health of people in the neighbourhood or among the population group they represent.

Social Justice Initiatives Fund

Encourages local community and voluntary groups to become involved in peace-building through reflection, discussion and action regarding issues relating to social justice, equality and human rights.

Telecommunity

Supports self-help groups involving older people, young people and people with disabilities through community based organisations in areas of disadvantage.

Ulster Bank Sir George Quigley Award Fund

Aims to help the community and voluntary sector achieve long-term sustainability for their work in honour of Sir George Quigley's retirement as chairman of the Ulster Bank.

You and Your Community Millennium Awards

Provides small grants to individuals, aged 12 years and older, to put bright ideas into action to benefit themselves and others. The grants are for individuals to undertake community projects and to gain the necessary skills and experience to help them implement their project on a voluntary basis. Priority is given to people from disadvantaged areas and groups. During the past couple of years, the themes for the projects the foundation

supports include: projects with young people; older people; physical environment; health and community care; arts and communication; community economic development; education; and community and social change.

YouthBank

Funds programmes managed by and for young people in Northern Ireland.

TYPES OF SUPPORT

Awards/prizes
Conferences/seminars
Educational/training programmes
Grants to individuals
Publications

APPLICATIONS

The application procedure is different for each programme. See website for available grants and deadlines.

TYPE OF FUNDER

Community foundation

GOVERNANCE

Board of Trustees
Mary Black, Chair
Maureen Armstrong
Baroness May Blood
Chrissie Cahill
Mark Conway
Barney Devine
Sammy Douglas
Dr Jeremy Harbison
Noreen Kearney
Philip McDonagh
Mike Mills
Duncan Morrow
John O'Neill
Hilary Sidwell

STAFF

Avila Kilmurray, Director
Stephen Bloomer, Policy and Research Communications Officer
Elizabeth Boyd, Clerical Officer
Stephen Catherwood, Finance Officer
Des Halferty, Trust Administrator
Caroline Hughes, Finance Officer
Margaret Jackson, Finance Officer

PUBLICATION TYPES

Annual report
Electronic/online information

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	8,695,733	12,290,789
Total Exp.	5,148,297	7,276,745

SOURCES OF FUNDS

Public, private donations and gifts.

ADDITIONAL ADDRESSES

67 Carlisle Road
Derry City, BT48 6JL
United Kingdom
Tel.: +44.28.7137.1547
Fax: +44.28.7137.1565

(Sources of information: Website)

ESMÉE FAIRBAIRN FOUNDATION

YEAR OF ESTABLISHMENT 1961

PRIMARY ADDRESS

11 Park Place
London, SW1A 1LP
United Kingdom
Tel.: +44.20.7297.4700
Fax: +44.20.7297.4701
E-mail: info@esmefairbairn.org.uk
Web: www.esmefairbairn.org.uk

KEY CONTACT

Margaret Hyde, Director

MISSION

To improve quality of life, particularly for people and communities that face disadvantage.

BACKGROUND

The Esmée Fairbairn Charitable Trust was formed by Ian Fairbairn, a prominent city figure and pioneer of the unit trust industry, in memory of his wife.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

The foundation provides grants in the following four programme areas:

- Arts and heritage
- Education
- Environment
- Social development

Arts and Heritage

Provides funds for projects that offer the most imaginative, high quality arts experiences to audiences, visitors and participants, or that facilitate the preservation

of national heritage. Priorities for arts funding are arts provision in under-served geographical areas, and nurturing innovation and emerging talent. Priority for heritage funding is given to projects outside of London.

Education

The trust has five priority areas for educational funding. These are early years development covering the years 0-5; family learning; school non-attenders; adult education; and the professional development of headteachers and leaders in education. The foundation particularly encourages applications that will benefit learners with physical and learning difficulties.

Environment

Support is provided for work in both the natural and the built environment, with an emphasis on promoting the understanding and practice of sustainable living.

Social Development

Focuses on improving the quality of life of people and communities facing disadvantage, or living in or on the edge of poverty. Deprived communities are targeted in both urban and rural areas. The funding priorities in this area are promoting community participation and self-help, and reducing institutional barriers that prevent people moving out of poverty and disadvantage.

AGEING ACTIVITIES

Recent Representative Grants

- The Third Age Trust: £63,959 towards the costs of expanding the U3A's distance learning resource centre for the benefit of the elderly across the UK. This trust seeks to promote active learning, research and community service among Third Agers everywhere
- SPARC - Strengthening participation: a regional comparison: a £500,000 partnership between Esmée Fairbairn, Workers' Educational Association (WEA) and National Institute of Adult Continuing Education (NIACE), to support the development of new strategies for engaging hard-to-reach adult learners in Barnsley (South Yorkshire) and the Forest of Dean. The programmes will test new approaches to recruiting and retaining some of the most isolated adults in community life and decision-making,

including the elderly and those with mental health difficulties. Planned interventions include an intergenerational learning programme, a home-based learning service for families on isolated farms in the Forest of Dean and a community radio project

- Beulah United Reformed Church, Rhiwbina, Cardiff: £13,525

Towards project costs to restore and conserve a green haven in the centre of a busy suburb for use by shoppers, the elderly and children attending a nursery

TYPES OF SUPPORT

Grants may be made towards revenue, capital or project expenditure.

APPLICATIONS

For grants under £100,000 an application form with full guidelines is available from the foundation. For grants over £100,000 the project proposal should be discussed by telephone before an application is put together.

Applications are acknowledged by letter, within five working days of arrival at the foundation. The allocation of grants up to £10,000 are made on an on-going basis by foundation staff, and decisions are normally made within two months of receipt. Grants applications for over £10,000 are dealt with by the trustees at quarterly meetings.

Applications over £100,000 are dealt with by the full board of trustees, and the foundation aims to complete the assessment process within five months.

Grants are provided for registered charities or groups with a charitable purpose. If a group is not a registered charity the foundation will request additional information. Details of this request are outlined in the application guidelines produced by the foundation.

RESTRICTIONS

The trust does not provide funding for the following:

- Animal welfare
- Individuals
- Retrospective grants
- Medical research
- Projects that do not directly benefit people in the UK
- Standard health services and day/residential care
- Endowment funds

- General appeals or circulars
- Expeditions or overseas travel
- Direct replacement of statutory funding
- Applicants who have applied within the previous 12 months

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

GOVERNANCE

Jeremy Hardie, Chair
 Tom Chandos, Treasurer
 Sir Antony Acland
 Beverley Bernard
 Ashley G. Down
 Felicity Fairbairn
 John S. Fairbairn
 Andrew Graham
 Rod Kent
 Kate Lampard
 Martin Lane Fox
 Baroness Linklater
 William Sieghart

HONORARY/ADVISORY COMMITTEE

Celia Atherton
 Sir Christopher Ball
 Hilary Bartlett
 Alison Rigg Campbell
 Hugh Lawlor
 Bill Osborne
 Elwyn Owens
 Hugh Raven
 Esther Salamon
 Baroness Stern

STAFF

Margaret Hyde, Director
 Shreela Ghosh, Programme Director - Arts and Heritage
 Hilary Hodgson, Programme Director - Education
 Tim Keenan, Programme Director - Environment
 Nicola Pollock, Programme Director - Social Development

PUBLICATION TYPES

Annual Report

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	667,907,000	944,038,163
Grants Exp.	26,500,000	37,455,830

SOURCES OF FUNDS

A large part of the trust's income is derived from its shareholding in M&G Group p.l.c.

(Sources of information: Annual Report and accounts 2003; Guidelines for applicants)

FONDATION CAISSES D'EPARGNE

YEAR OF ESTABLISHMENT 1994

ESTABLISHMENT

PRIMARY ADDRESS

27-29 rue de la Tombe Isoire
 75673 Paris Cedex 14
 France
 Tel.: +33.1.5840.3130
 Fax: +33.1.5840.3578
 E-mail: FCES@fondation.caisse-epargne.fr

KEY CONTACT

Didier Tabuteau

MISSION

To fight social exclusion, which can affect people throughout life, and to promote the initiatives of all branches of the Groupe Caisse d'Epargne for the benefit of people of all ages, with the intention of contributing to inter-group and inter-generation solidarity.

BACKGROUND

The Fondation Caisses d'Epargne was created in 1994 by the Groupe Caisse d'Epargne, under the aegis of the Fondation de France, with the aim of preventing social exclusion of those people in difficult situations who have not had the ability or resources to put aside any savings. The role of the foundation is embedded in the historical social responsibility of the Caisse d'Epargne which aims to prevent people from being dependent on others.

GEOGRAPHIC FOCUS

France

RELATED ORGANISATIONS

Groupe Caisse d'Epargne

PROGRAMME AREAS

The foundation focuses on the causes of exclusion through actions in three main areas:

- Illiteracy
- Employment
- The elderly

Illiteracy

Helps those who find it difficult to master basic skills such as reading; writing; mathematics; and time and spatial awareness. It also supports young children of pre-school age by providing additional education, which

is useful for school achievement; promotes improvement of studying skills among both young people and adults; and assists voluntary helpers involved in training or cultural and social projects which are designed to help both young and adult illiterates.

Employment

Supports the following types of projects: studies, conferences, research projects and experiences aimed at creating a better understanding of the link between employment and exclusion; economic reintegration projects within sustainable enterprises; the re-establishment of citizen's rights for those who are excluded; and action against illiteracy associated with economic initiatives.

The Elderly

To combat negative social stereotypes of the elderly, and the negative effects on elderly people of these images, the foundation supports actions aimed at promoting the potential and experience of elderly people; helping people to be self-reliant and motivated; studying the status and role of carers for the elderly; and promoting a better image of older people in society.

AGEING ACTIVITIES

Examples of recently supported projects include:

- Learning to read with adoptive grandparents
- Caisses d'Epargne Residence
- Home help

Learning to Read with Adoptive Grandparents

Provides funding to the Lire et Faire Lire Association (Reading and Getting to Read) in Normandy, France, to help young children learn to read, avoiding the situation where children from disadvantaged neighbourhoods are still virtually illiterate when they reach secondary school. The project also seeks to reduce the social isolation of the elderly who, by volunteering to help the association, work in local schools and transmit their love of reading to the young people and, in the process, rediscover the sense of being useful through the bond forged with the younger generations. Caisse d'Epargne finances the acquisition of the teaching material used by the volunteers with the children, and pays for

a part of their training in remedial reading techniques.

Caisses d'Epargne Residences

Manages residences providing health care and social welfare. In 2003, the foundation sought to expand the network of residences, to increase reception capacities and improve comfort and safety.

Three new centres providing just over 220 new beds joined the foundation and work began on two new residences in the Provence-Alpes-Côte d'Azur region. These new centres will be finished at the end of 2004 and offer beds for 56 more people in Salles-d'Aude, and 50 new beds in Gruissan. The foundation also opened a new 70-bed residence in October 2003 in Saint-Mandé, a town in the eastern suburbs of Paris. All the residences have already signed, or are currently in negotiations to sign, a long-term tripartite agreement enabling them to be classified as institutions providing accommodation for the dependent elderly (EHPAD).

Home Help

Focuses on tailoring individuals' homes to their specific needs and promoting the use of home automation and robots for the service of the elderly and disabled. This initiative sets out to link the foundation's residences and domestic support services within a network in order to improve the services provided in everyday life and reinforce social ties.

Other actions undertaken by specific branches of Caisses d'Epargne include encouraging the creation of mobile teams providing home support services, supporting the creation of the cancer/geriatrics network, and organising pain-relief services or palliative care at home.

TYPES OF SUPPORT

Conferences/seminars
Equipment
Programme development
Publications
Research

APPLICATIONS

Project proposals should be sent to the local branch of the Groupe Caisse d'Epargne in the region where the project will be based. The foundation gives preference to initiatives

FONDATION CLAUDE POMPIDOU

which involve partnerships with disadvantaged people where they contribute to the conception, implementation and evaluation of the initiative.

Initial approach by letter.

RESTRICTIONS

Grants no financial support to private individuals.

LANGUAGES ACCEPTED

French

TYPE OF FUNDER

Corporate foundation

GOVERNANCE

Charles Milhaud, President
Alain Bentolila, Vice-President
Nicole Moreau, Vice-President
Bruno Mettling, Treasurer
Bernard Monier, Secretary
Jean Boissonat
Philippe Douste-Blazy
Françoise Laplazie
Jean Levallois
Brigitte Plisson

STAFF

Charles Milhaud, President
Didier Tabuteau, Director
Marguerite Azcona
Marie-Magdeleine Farjat
Jean-Claude Gérard
Emmanuel Goddat
Francis Lavoine
Maryvonne Lyazid
Marie-Thérèse Montupet
Patrick Naudet
Philippe Pillon
Eric Pollion

PUBLICATION TYPES

Information brochures
Newsletters/periodicals

SOURCES OF FUNDS

Savings Bank Group.

AFFILIATIONS

Fondation de France

(Sources of information: Information brochures; Annual Review 2003)

YEAR OF

1970

ESTABLISHMENT

PRIMARY ADDRESS

42, rue du Louvre
75001 Paris
France

Tel.: +33.1.42.36.4573

Fax: +33.1.42.21.1917

Web: www.fondationclaudepompidou.asso.fr

KEY CONTACT

Jean-Marie Martial, Director

MISSION

To help the elderly and the handicapped, and to promote the development of volunteerism.

BACKGROUND

Named after the former French president, the foundation is recognised by French law as working in the public interest.

GEOGRAPHIC FOCUS

Principally France

PROGRAMME AREAS

Main areas of interest are:

- The promotion of volunteerism (the foundation mobilises teams of volunteers to help in hospitals, families with handicapped children and the aged)
- The establishment and running of social clubs for the elderly
- The establishment and running of specialised centres such as a centre for minors with social or family difficulties, a work centre for mentally handicapped adults and a long-stay nursing home for the invalid elderly
- Scholarships/research grants for the study of the biology of ageing and perinatology

AGEING ACTIVITIES

The foundation, in partnership with the University Hospital of Nice (CHU), has set up an institute for care and professional care training for the elderly. The institute aims to study normal and pathological ageing and the availability of care services; evaluate memory problems; provide professional staff with techniques that stimulate memory in patients; and offer memory rehabilitation group therapy. The institute offers short and long-term care facilities for the elderly; a special unit to care for individuals with Alzheimer's; and an outpatient centre.

TYPES OF SUPPORT

The foundation funds its own projects; some scholarships and research grants are awarded.

TYPE OF FUNDER

Fund-raising foundation

GOVERNANCE

Mrs Claude Pompidou, Chair
 Jacques Chirac, Treasurer
 Simone Veil, Secretary
 Jean Cherioux
 Jean Frezal
 Yves Grosogeat
 Michel Lagrave
 Jacques Miginiac
 Robert Prigent
 Jean Saulnier
 Minnie Segat
 Gérard Vincent

STAFF

Jean-Marie Martial, Director
 Raymond-Max Aubert, Secretary General

PUBLICATION TYPES

Annual report
 Information brochures

SOURCES OF FUNDS

Donations; legacies; fund-raising events; grants from businesses.

(Sources of information: EFC profile form; Information brochure)

FONDATION DE FRANCE

YEAR OF 1969

ESTABLISHMENT**PRIMARY ADDRESS**

40 Avenue Hoche
 75008 Paris
 France
 Tel.: +33.1.44.21.3100
 Fax: +33.1.44.21.3101
 E-mail: fondation@fdf.org
 Web: www.fdf.org

KEY CONTACT

Francis Charhon, Director General

NAME IN ENGLISH

Foundation of France

MISSION

To help organisations realise philanthropic, cultural, scientific and general interest projects.

BACKGROUND

Fondation de France was established on the initiative of General De Gaulle and André Malraux to help individuals and companies carry out philanthropic, cultural, environmental or scientific projects and social activities. It is a private non-profit organisation recognised by the government as a charity working in the public interest. The foundation is an umbrella organisation for other foundations, it receives donations and legacies, and awards scholarships and prizes.

GEOGRAPHIC FOCUS

France, Europe and developing countries

PROGRAMME AREAS

The foundation is active in the areas of collecting funds and giving guidance in creating foundations under its aegis. It supports programmes in the following areas:

- Social cohesion
- Health and medical research
- Culture
- Environment
- Charitable organisations

Social Cohesion

Identifies flexible and appropriate solutions; gives assistance over a number of years; provides funding; and makes results known – this is the role of the Fondation de France in such fields as: social cohesion (housing, employment and activity), children (prevention of violence), people with disabilities, the elderly, international solidarity, and multimedia.

Health and Medical Research

Works in the areas of information and training, public health and medical research. Focuses on medical ethics and research; children; pain; addictions; psychological disease; palliative care; and health education for young people.

Culture

The aim of Fondation de France is to restore to society, in all its diversity, the means to express its cultural aspirations and establish new relations with its artists. In this framework, it has set up pilot programmes in which it carries out its missions as mediator between artists and society. It also helps develop tools for training and encouraging critical analysis.

Environment

Focuses on sustainable local development and management of natural resources through participation, conflict prevention and mediation. Promotes community gardens as a basis for social inclusion and the exploration of environmental issues and supports child education with a project at a school of Biodiversity in Branféré, Morbihan, Brittany.

Charitable Organisations

Supports the development of some 500 foundations. Two-thirds of Fondation de France grants come from individual foundations which contribute capital and designate a field for support in the form of prizes, scholarships and grants. Grants are made to institutions, and prizes are awarded to individuals in the fields of science and medical research.

AGEING ACTIVITIES

The foundation funds projects in the following areas:

- Social inclusion
- Training
- Independent living
- Night care assistance

Social inclusion

Funds local actions that seek to restore the social link within the community. Actions may include improving access to services such as transport and shopping amenities; tailoring these services to the needs and financial status of the elderly; and developing areas in the community where the elderly can socialise.

Training

Provides financial support for the professional training of teams of carers for the elderly. These comprise professional medical staff, volunteers or care-providing family members. The training should give carers an opportunity to gain a better understanding of the needs of the elderly; improve the technical quality and delivery of care; and enable carers to exchange practices together with other actors such as local residents, family members, volunteers, and health professionals.

Independent living

Funds residential homes and home care service providers that seek to develop new approaches to care assistance to ensure

independent living and an enhanced quality of life for the elderly.

Night Care Assistance

Offers funding for the development of night care assistance comprising on-call professional care worker services or/and programmed night care duty. Projects should examine needs and existing services in the locality; outline the feasibility of introducing new services; and identify partners.

TYPES OF SUPPORT

Awards/prizes
Educational/training programmes
Publications
Research
Scholarships
Technical assistance

APPLICATIONS

A standard application form for each programme is available on the foundation's website.

RESTRICTIONS

Maintenance grants, capital endowments, payment for budgetary deficits and contributions to general appeals are excluded.

LANGUAGES ACCEPTED

French

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Fondation reconnue d'utilité publique

GOVERNANCE

Bertrand Dufourcq, President
Claude Bussière, Vice-President

HONORARY/ADVISORY COMMITTEE

Pierre Giraudet, Honorary President
Olivier Philip, Honorary President

STAFF

Francis Charhon, Chief Executive
Patrice Gonon, Secretary General, Ongoing Recruitment Development
Dominique Lemaistre, Mécénat, Programmes and Foundations
Florence Delacour-Le Petit, Human Resources
Catherine Vaille, Legal and Administration
122 full-time staff
340 volunteers

PUBLICATION TYPES

Annual report
Application guidelines
Electronic/online information

Monographs
Newsletters/periodicals

FINANCIAL INFORMATION

2003	EURO	EURO
Total Assets	674,996,176	674,996,176
Total Exp.	116,693,018	116,693,018
Programme Exp.	63,496,550	63,496,550

SOURCES OF FUNDS

Donations and bequests, revenue from endowment and government funding.

NOTES ON FINANCIAL INFORMATION

Remaining figures include all foundations under the management of Fondation de France.

AFFILIATIONS

Friends of Fondation de France (USA)
EFC Founding Member

(Sources of information: Annual Report 2003; Le mécénat des donateurs; Website; Verified by funder)

**FONDATION NATIONALE DE
GÉRONTOLOGIE**

YEAR OF 1967

ESTABLISHMENT

PRIMARY ADDRESS

49 rue Mirabeau
75016 Paris
France
Tel.: +33.15.574.6700
Fax: +33.15.574.6701
E-mail: fondation@fng.fr
Web: www.fng.fr

KEY CONTACT

Geneviève Laroque, President

NAME IN ENGLISH

National Foundation for Gerontology

MISSION

To lead and take part in fundamental research in the biomedical, epidemiological, socio-demographic, economics, psychology and social fields; to advance and disseminate knowledge available on any subjects relevant to old age and ageing and to keep interested parties up to date with works in progress; to work to change stereotyped and negative representations associated with advancing age; to establish international collaborations to widen the knowledge base and the prospects for the action.

BACKGROUND

Fondation Nationale de Gérontologie (FNG) was created in 1967 by a group of public authorities, the main basic or supplementary social security systems in France and national research centres working in the field of health. The FNG was recognised as a utility of public interest on 21 September 1967.

GEOGRAPHIC FOCUS

France and worldwide

PROGRAMME AREAS

The foundation's current activities include:

- Information service
- Publications
- Human rights
- Intergenerational projects
- Advancing health and well-being into old age
- Research
- Training of health providers
- International activities

Information Service

The FNG maintains a library and an information centre for both written and audio-visual materials on the subjects of gerontology and ageing. It is open to the public and holds approximately 15,000 items.

Publications

Publishes a quarterly journal *Gérontologie et Société*, founded in 1975, of which there have been over 100 issues dealing with all aspects of ageing. The foundation also publishes results of, and actions arising from, seminars and workshops.

Human Rights

Manages a permanent committee on the rights and freedom of the elderly in collaboration with l'Association Francophone des droits de l'homme âgé and the national association ALMA (Allo Maltraitance). In 1987, the committee drew up the first charter on the rights and liberties of the elderly, published under the aegis of the French Ministry of Social Affairs.

Intergenerational Projects

Runs the programme 'Growing is ageing, ageing is growing', under which a literary prize for youth on issues concerning age cycles and intergenerational activities (in French-speaking countries) was created.

Advancing Health and Well-being Into Old Age

Assesses cognitive stimulation by evaluating quality of life in institutions for the elderly. Coordinated the European study 'SYST-EUR High Blood Pressure in the elderly' for France and the 'SYST-EUR Vascular Dementia Project for Europe.

Research

Leads fundamental or applied research in biomedical, epidemiological, socio-demographic, psychological or social fields. Compiles a directory of French research workers and current studies in the field of gerontology.

Training of Health Providers

Proposes different practices and methods for training of health workers. In France, the foundation implements the Resident Assessment Instrument (RAI). Trains people in the application of AGGIR. This is a scale, recommended by the French authorities, which measures dependency in old age.

International Activities

Involvement in the networks created by EuroLink Age and by the European association AGE since 2001. Collaborates with the International Longevity Center (ILC). Through these activities, the FNG promotes the rights of elderly people and modifies the image of ageing.

TYPES OF SUPPORT

Awards/prizes
Conferences/seminars
Educational/training programmes
Funder-operated programme
Publications
Public Awareness Campaigns
Research
Staff development (non-teaching)

LANGUAGES ACCEPTED

French, English, German and Spanish

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Reconnue d'utilité publique le 20 septembre 1967

HONORARY/ADVISORY COMMITTEE

Honorary Presidents

Pierre Laroque
Clément Michel
Francis Pavard

STAFF

Geneviève Laroque, President
Pr Françoise Forette, Director
Jean-Michel Hôte, Secretary General
Françoise Montenont, Accountant

Information Service

Lydie Audureau
Agnès Beghi
Gaëlle Biet
Olivier Létang
Véronique Suhard

Literary Prize

Geneviève Arfeux-Vaucher
Isabelle Besson
Jacqueline Gaussens
Bernard Paris

PUBLICATION TYPES

Electronic/online information
Information brochure
Monographs
Publications catalogue/list

AFFILIATIONS

Founding organisations:

Assistance Publique - Hôpitaux de Paris (AP - HP)
Institut National de la Santé et de la Recherche Médicale (INSERM)
Caisse Nationale d'Assurance Vieillesse des Travailleurs Salariés (CNAV)
Caisse Nationale d'Assurance Maladie des Travailleurs Salariés (CNAMTS)
Caisse Centrale de la Mutualité Sociale Agricole (CCMSA)
Caisse Nationale d'Assurance Vieillesse des Professions Libérales
Caisse de Compensation de l'Organisation Autonome Nationale de l'Industrie et du Commerce (ORGANIC)
Caisse Autonome Nationale de Compensation d'Assurances Vieillesse des Artisans (CANCAVA)
Caisse Nationale des Barreaux Français (CNBF)
Caisse Nationale Militaire de Sécurité Sociale
Caisse Autonome Nationale de la Sécurité Sociale dans les Mines
Caisse de Retraite et de Prévoyance des Clercs et Employés de Notaires (CRPCEN)
Caisse Centrale d'Activités Sociales du Personnel des Industries Electrique et Gazière (CCAS)
SNCF

Association Générale des Institutions de
Retraite des Cadres (AGIRC)
Association des Régimes de Retraites
Complémentaires (ARRCO)

(Sources of information: Website)

**FONDAZIONE CASSA DI RISPARMIO
DELLE PROVINCE LOMBARDE**

YEAR OF ESTABLISHMENT 1991

PRIMARY ADDRESS

Via Manin, 23
20121 Milan
Italy
Tel.: +39.02.623.91
Fax: +39.02.623.9202
Web: www.fondazionecariplo.it

KEY CONTACT

Dr Renato Ravasio, Secretary General

NAME IN ENGLISH

Cariplo Foundation

MISSION

To promote scientific research and the civil, cultural, economic and social development of Italy.

BACKGROUND

The Fondazione Cassa di Risparmio delle Province Lombarde (Cariplo) was created to perform charity work when the savings bank turned into a private corporation. It continues the philosophy of the former economic public institute Cassa di Risparmio. In 2000, a new structure allowed Fondazione Cariplo to operate through local community foundations and other foundations specialising in the foundation's specific areas of interest.

GEOGRAPHIC FOCUS

The region of Lombardy in Italy

RELATED ORGANISATIONS

Fondazione Cariplo ISMU, Banca Intesa (BCI)

PROGRAMME AREAS

The foundation supports the following initiatives:

- Social services
- Scientific research
- Arts and culture
- Training, education and learning
- Health and medical assistance

- Environmental protection
- Support for public works and services
- Voluntary services and community foundations

Social Services

Provides assistance, charity and protection to the weakest parts of society, mainly focusing on the poor, the elderly, the disabled, youth, children and ethnic groups; and supports the rehabilitation of people with both physical and mental diseases.

Scientific Research

Promotes different branches of scientific research through the training of researchers, purchase of equipment, integration of the national scientific community with the international one, and the exchange of knowledge and information.

Arts and Culture

Aims to purchase, preserve and restore monuments, works of art and goods of historical and scientific value with the aim of increasing their value and raising public awareness about them.

Training, Education and Learning

Supports the development of professional and technical training, and the spread of culture, knowledge and education; and promotes learning activities.

Health and Medical Assistance

Promotes the supply of new services and the improvement of existing ones.

Environmental Protection

Promotes the conservation of the environment, flora and fauna, and pursues the purchase of areas of environmental value to foster the creation of natural parks and protected areas.

Support for Public Works and Services

Supports projects that create facilities in the field of public works and services, and promotes initiatives with social and cultural purposes.

Voluntary Services and Community Foundations

Supports a special volunteering fund to help run service centres for volunteer organisations, associations and the third sector in general. It has also provided financial support for the creation of community foundations in the region.

AGEING ACTIVITIES

The foundation funds in the field of social housing, and supports experimental third-sector initiatives that aid the development of housing projects for low-income and marginalised people, including the elderly. An example of this is the foundation's contribution to the development of the Barona Village Project, an integrated complex, situated in the centre of the low-income neighbourhood near Milan. The project aims to create a small village, comprising residential houses for the elderly, services for children, young people, disabled, commercial activities and a park. The main objective is the development of an integrated approach to housing and social issues which respects the needs expressed by the local communities and marginalised groups. The ambition of the project is to create a nice, pleasant space, where situations that are normally hidden can become visible: the issues of physical and mental disability, the need for assistance for the elderly, the condition of marginalisation of some categories of the population such as people with terminal diseases, former drug addicts, etc. The entire project will cost 20 million euros. The funding for the project has been provided by the owner of the area, the Foundation Cassoni (15 million euros); and by a bank foundation, Foundation Cariplo (3 million euros), and also another bank, Banca Popolare di Milan (2 million euros).

TYPES OF SUPPORT

- Building/renovation
- Capital support
- Challenge/matching support
- Collections acquisition
- Conferences/seminars
- Continuing support
- Curriculum development
- Educational/training programmes
- Employee volunteering/technical assistance
- Equipment
- Funder-operated programmes
- General support/general purposes
- Publications
- Research
- Staff development

APPLICATIONS

Applications must specify all necessary details for evaluative purposes. Preliminary

investigations are performed by the grants office.

Initial approach by letter.

RESTRICTIONS

No grants for individuals; political parties; trade union or patronage organisations; trade associations; political propaganda that could influence legislative processes or election campaigns; initiatives that may restrict the freedom or dignity of citizens, or lead to discrimination; subscriptions of associative fees or participating shares; subscriptions in general; or sports activities, except if related to young or disabled people. Funds are not given to associations, committees and others whose fund-raising initiatives are devoted to other organisations which could be directly supported; medical expenses which are part of ordinary operating costs; or initiatives requiring the foundation to undertake managerial responsibilities.

LANGUAGES ACCEPTED

Italian and English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Private law foundation

GOVERNANCE

Giuseppe Guzzetti, President
Carlo Sangalli, Vice-President
Aldo Scarselli, Vice-President
Angelo Abbondio
Giovanni Azzaretti
Yves Barsalou
Marisa Bedoni
Enzo Berlanda
Antonio Carnelli de Micheli Camerana
Silvia Costa
Ugo Dozzio Cagnoni
Renato Dulbecco
Mariella Enoc
Bruno Ermolli
Elio Fontana
Marco Frey
Lorenzo Gaidella
Luigi Galassi
Luca Galli
Rupert Graf Strachwitz
Beniamino Groppali
Ubaldo Livolsi
Federico Manzoni
Guido Martinotti
Piercarlo Mattea

Mario Miscali
 Remigio Moratti
 Mario Romano Negri
 Massimo Nobili
 Roberto Pancirolli
 Giorgio Pastori
 Paolo Raineri
 Virginio Rigoldi
 Romeo Robiglio
 Carlo Rubbia
 Ferdinando Superti Furga
 Graziano Tarantini
 Livio Torio
 Carlo Vimercati
 Mario Zanone Poma

HONORARY/ADVISORY COMMITTEE

Giuseppe Guzzetti, President
 Carlo Sangalli, Vice-President
 Aldo Scarselli, Vice-President
 Roberto Artoni
 Paolo Morerio
 Fabio Pierotti Cei
 Ezio Riva
 Felice Scalvini
 Marco Spadacini

STAFF

Dr Renato Ravasio, Secretary General

PUBLICATION TYPES

Annual report
 Conference reports/proceedings
 Electronic/online information
 Financial statement
 Monographs

FINANCIAL INFORMATION

2004	EURO	EURO
Total Assets	5,808,585,889	
	5,808,585,889	
Total Exp.	144,060,523	144,060,523
Grants Exp.	135,382,802	135,382,802
Number of grants:	938	

SOURCES OF FUNDS

Interest from assets and stock dividends.

AFFILIATIONS

Associazione Cassa di Risparmio Italiane
 EFC Funding Member

(Sources of information: EFC membership application form; Website; Verified by funder)

FONDAZIONE RODOLFO DEBENEDETTI

YEAR OF ESTABLISHMENT 1998

PRIMARY ADDRESS

Via Salasco, 5
 20136 Milan
 Italy
 Tel.: +39.025.836.3341
 Fax: +39.025.836.3309
 E-mail: info@frdb.org
 Web: www.frdb.org

KEY CONTACT

Carlo De Benedetti, President

NAME IN ENGLISH

Rodolfo DeBenedetti Foundation

MISSION

To promote applied and policy oriented research to current affairs in Italy and beyond.

BACKGROUND

In 1998, the Rodolfo DeBenedetti Foundation was established by entrepreneur Carlo DeBenedetti, whose latest venture is CDB Web Tech; a public company specialising in worldwide investments in high-tech funds and Internet companies. Carlo De Benedetti is Executive Chairman and controlling shareholder of CDB Web Tech. He also chairs the foundation, which is named in memory of his father.

GEOGRAPHIC FOCUS

Italy and Europe

PROGRAMME AREAS

The foundation promotes applied and policy oriented research on the following main topics:

- Reform of public pension systems in light of demographic trends, the ongoing transformation of capital markets and political economy limits to the reforms
- Causes of European unemployment, its social costs and the political feasibility of strategies aimed at liberalising EU labour markets
- Harmonisation and coordination of social and immigration policies in the European Union as a precondition for effective labour mobility across EU countries
- The dynamics of poverty, inequalities and the role played in this respect by the welfare systems

The foundation aims to achieve this through promoting three kinds of initiatives:

- Annual European conferences
- Workshops
- Rodolfo Debenedetti lectures

Annual European Conferences

These are based on reports prepared by teams composed of senior academicians, professional economists operating in international organisations and advisors to policy-makers. The team members work in cooperation with the foundation, which coordinates the various working groups. The topics of the conferences are defined in the framework of the two-year plan for the foundation's activities.

Workshops

Held on themes relating to Italian current economy, the workshops envisage the presence of experts from countries that have recently implemented important reforms of its social welfare system. The experts are asked to describe these experiences, devoting particular attention to policy implementation and enforcement issues, including the gathering of the necessary social consensus around the reform package. Aims to draw lessons to be borne in mind when reforming the Italian labour market and social welfare systems.

Rodolfo Debenedetti Lectures

Public lectures by leading academics on issues at the forefront of economic research. Presents new and evolving research to a non-technical readership on topics, such as: the implications of the ageing of populations; long-term trends in income distribution; the changing size and composition of welfare states in an integrated Europe; labour market reforms and the transitions in employment, unemployment and inactivity, as well as the spread of temporary work; international and regional migration; the future of trade unions and collective bargaining; and the political economy of social to welfare reform. In addition to publishing the proceedings of the conferences, the foundation produces a newsletters 'Note Rapide' published on its website. The foundation also offers a documentation centre on social policy reforms and EU labour markets. The material held at the centre is available to economics students and researchers, including the

foundation's library containing books, publications on labour and welfare economics, and a section dedicated to statistical datasets.

AGEING ACTIVITIES

Alongside similar activities on the subjects of labour, social assistance, immigration and Europe, the foundation currently hosts meetings, public debates and seminars on issues relating to pension provision. Themes include pension and welfare reforms, spread of information on pension entitlement and lessons learned from pension schemes throughout Europe.

TYPES OF SUPPORT

Conferences/seminars
Funder-operated programme
Publications
Research
Student aid

LANGUAGES ACCEPTED

Italian and English

TYPE OF FUNDER

Independent foundation

HONORARY/ADVISORY COMMITTEE

Fellows

Giacomo De Giorgi
Marco Leonardi
Mario Macis
Franck Malherbet
Virginia Hernanz
Antonella Trigari

Affiliates

Giovanna Albano
Randolph Bruno
Ignacio Conde-Ruiz
Francesco Fasani
Giovanna Labartino
Francesco Legrenzi
Mauro Maggioni
Mattia Makovec
Francesca Mazzolari
Antonio Mele
Antonio Menezes
Gaia Narciso
Silvia Redaelli
Saverio Scaramuzzo
Battista Severgnini
Domenico Tabasso

STAFF

Carlo De Benedetti, President
Tito Boeri, Director of Science
Pietro Garibaldi, Head of Labour Studies

Michele Pellizzari, Head of Welfare Studies
Simona Baldi, Research Assistant
Paola Monti, Research Assistant
Roberta Marcaletti, Administrative Assistant

PUBLICATION TYPES

Conference/meeting report
Electronic/online information
Newsletter
Publications catalogue/list
Publications in two or more languages

(Sources of information: Website)

FUNDAÇÃO CALOUSTE GULBENKIAN

YEAR OF 1956

ESTABLISHMENT

PRIMARY ADDRESS

Avenue de Berna, 45A
1067-001 Lisbon
Portugal
Tel.: +351.21.782.3212
Fax: +351.21.782.3025
E-mail: gabpres@gulbenkian.pt
Web: www.gulbenkian.org

KEY CONTACT

Rui Esgaio, Head of the President's Office

NAME IN ENGLISH

Calouste Gulbenkian Foundation

MISSION

To support and promote charitable, artistic, educational and scientific endeavours.

BACKGROUND

The Calouste Gulbenkian Foundation was perpetually established in the will of Calouste Sarkis Gulbenkian, a British citizen born to a family of Armenian origin who is well known for being one of the architects of the oil industry in the Middle East, and a discerning and knowledgeable art collector.

GEOGRAPHIC FOCUS

Portugal, Europe, Portuguese-speaking countries, worldwide Armenian communities, and international

PROGRAMME AREAS

The foundation operates in the following areas:

- Charity
- Arts
- Education
- Science
- International

Charity

The Health and Human Development Department provides grants for public health and social exclusion issues, focusing on a spectrum of activities which include health care; hospital services and equipment; preventive and palliative medicine; poverty; childcare and welfare of the elderly; and immigrants.

Arts

Maintains a museum, which houses the founder's private collection, and a Modern Art Centre, which comprises and exhibits the foundation's collection of contemporary art works. The foundation also runs the following departments:

- The Fine Arts Department supports the creation, dissemination and research on plastic arts, architecture and design, history of art, archaeology and heritage, cinema and theatre
- The Music Department manages three resident artistic groups – an orchestra, a choir and a ballet – and annually promotes a music and dance season, with the finest performers in terms of creation and musical interpretation, both national and internationally

Education

The Educational Department promotes educational development in Portugal, in particular through projects and activities that foster lifetime training; the use of new technologies in education; the acquisition of new skills and know-how to increase the educational/training system effectiveness; the development of basic training areas; and all activities contributing to the full development of children, young people and adults, in emotional, cognitive, social and cultural terms. Also in the field of education, the foundation houses an art library with more than 220,000 documents, including books, audiovisual and multimedia records.

Science

- The Science Department provides grants for the stimulation of creativity and scientific research; the promotion of links between science and culture; and the strengthening of interaction between science and society
- The Instituto Gulbenkian de Ciência (IGC) focuses on biomedical sciences,

and actively contributes to the renewal of scientific research in Portugal through the running of a competitive PhD programme and operating as a 'host institution', where young scientists are provided with cutting-edge technology for conducting their own research projects in full autonomy for periods of up to 5 years

International

The foundation is also active abroad in Africa and East Timor (Portuguese speaking countries) and in serving the Armenian diaspora. The work done by the foundation in Africa and East Timor mainly involves institutional capacity-building, reforming education systems, training trainers in education and health, fighting major epidemics and improving health systems. In addition, it maintains a delegation in London (UK Branch), awarding grants in the UK and the Republic of Ireland, and the Calouste Gulbenkian Cultural Centre in Paris. The foundation also has a specific grantmaking programme directed at the preservation of Portuguese cultural heritage, primarily committed to the recovery of Portuguese historical monuments throughout the world, and a programme dedicated to the promotion of Portuguese language and culture abroad.

AGEING ACTIVITIES

One priority of the foundation's Health and Human Development Department is protection of the elderly. This consists of supporting institutions specialising in the promotion of inter-family assistance, broadening home care support networks and improving conditions in homes for the elderly and day and night care centres. In 2003, total grants amounted to 328, 418 euros for this area.

TYPES OF SUPPORT

Awards and prizes
Conferences/seminars
Educational/training programmes
Fellowships
Grants
Publications
Research
Scholarships

APPLICATIONS

Each department and/or programme has specific application procedures

RESTRICTIONS

Ineligible applications:

- Ongoing general operating expenses or existing deficits
- Endowment or capital costs
- For-profit organisations
- Applications for founder membership of non-profit organisations
- Retrospective grants
- Promotion of religion or political issues

LANGUAGES ACCEPTED

Portuguese, English, French and Armenian

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Private Portuguese institution of declared public utility

GOVERNANCE

Board of Trustees

Emílio Rui Vilar, Chair

Mikhael Essayan, Honorary Chair

Diogo de Lucena

Isabel Mota

Eduardo Marçal Grilo

Eduardo Lourenço de Faria (Non-executive)

André Gonçalves Pereira (Non-executive)

Artur Santos Silva (Non-executive)

Teresa Gouveia

Accountancy Checking Commission

Director-General for the Budget

Director-General for Social Welfare

Member appointed by the Lisbon Academy of Science

Member appointed by the National Academy of Fine Arts

Member appointed by the Bank of Portugal

STAFF

Heads of Department

Rui Esgaio, Office of the President and Secretary to the Board of Trustees

Manuel Rodrigues Gomes, Health and Human Development

João Castel-Branco Pereira, Museum

Manuel Costa Cabral, Visual Arts

Jorge Molder, Modern Art Centre

José Afonso Furtado, Art Library

Luís Pereira Leal, Music

Manuel Carmelo Rosa, Education and Scholarships

Joana Varela, *Colóquio Letras* Magazine

António Coutinho, Gulbenkian Science Institute

João Caraça, Science
João Pedro Garcia, International Department
and Portuguese Cultural Centre in Paris
Zaven Yegavian, Armenian Communities
Paula Ridley, UK Branch
Alasdair Mackintosh, Finance and
Investment
Cristina Pires, Budget, Planning and Control
António Repolho Correia, Central Services
Ana Rijo da Silva, Human Resources
Jorge Wemans, Communication
583 full-time staff

PUBLICATION TYPES

Annual report
Education Publications Plan (Classics,
University Manuals, etc.)
'Colóquio-Letras' (Periodical)
Newsletter (Monthly)

FINANCIAL INFORMATION

2004	EURO	EURO
Total Assets	2,400,000,000	2,400,000,000
Total Exp.	100,050,000	100,050,000
Number of grants:	1,975	

SOURCES OF FUNDS

Financial portfolio, and oil and gas interests.

NOTES ON FINANCIAL INFORMATION

In 2004, the foundation disbursed 6,075
scholarships.
The Total Assets figure is approximate.

AFFILIATIONS

Portuguese Foundation Centre
The Hague Club
European Policy Center
EFC Funding Member

ADDITIONAL ADDRESSES

UK Branch
98, Portland Place
London, W1B 1ET
United Kingdom
Tel.: +44.20.7636.5313
Fax: +44.20.7908.7580
E-mail: info@gulbenkian.org.uk

Centre Culturel Calouste Gulbenkian
51, Avenue d'Iéna
75116 Paris
France
Tel.: +33.1.53.23.9393
Fax: +33.1.53.23.9399
E-mail: calouste@gulbenkian-paris.org

*(Sources of information: Website; Verified by
funder)*

FUNDACIÓ 'LA CAIXA'

YEAR OF 1991

ESTABLISHMENT

PRIMARY ADDRESS

Diagonal, 621
08028 Barcelona
Spain
Tel.: +34.93.404.6141
Fax: +34.93.404.6048
E-mail: info.fundacio@lacaixa.es
Web: www.fundacio.lacaixa.es

KEY CONTACT

Antoni Aliana Magri, Deputy Director
General

MISSION

To fill social, educational, scientific and
cultural gaps by making proper use of its
resources and creating programmes that are
geared to the needs of society and the
improvement of the quality of life.

BACKGROUND

Fundació 'La Caixa' (FLC) came into being
as a result of the merger of the Fundació
Caixa de Pensions and Fundació Caixa de
Barcelona. It is a non-profit organisation
dedicated to serving society. The foundation
is funded by the Caixa d'Estalvis i Pensions
de Barcelona which, as a savings bank under
Spanish law, may apply approximately 50%
of its profits to socio-cultural activities.

GEOGRAPHIC FOCUS

Spain, where La Caixa operates

FORMER NAME

Fundació Caixa de Barcelona

RELATED ORGANISATIONS

Caixa d'Estalvis i Pensions de Barcelona

PROGRAMME AREAS

The foundation operates the following
programmes:

- Social projects
- Science and environmental projects
- Educational projects
- Cultural projects

Social Projects

Supports centres and activities for senior
citizens as well as social care projects
designed to alleviate the consequences of
Alzheimer's disease and to prevent
HIV/AIDS. It also supports initiatives to
prevent social marginalisation and to boost
progress in developing countries. The

foundation helps to bring new technology into the lives of senior citizens and into schools, to improve communication for those groups.

Science and Environmental Projects

Promotes science and the environment, with science museums in Barcelona and Madrid playing an important role. The museums continue to be a venue for study conferences, courses and scientific events.

Educational Projects

Training is an important part of the foundation's activities. The educational projects are based around the awarding of postgraduate grants, assisting specialised schools of Nursing and Computers, and 'Educalia', the virtual educational community. This section also includes such educational resources as 'Euroaventura' or 'Living in Historic Cities'.

Cultural Projects

The foundation, by means of art and photographic exhibitions and concerts, offers a global, humanistic vision of culture, as well as including the latest in avant-garde trends. Educating young children about art and music is another priority for the foundation.

AGEING ACTIVITIES

The foundation runs the following programmes targeting the elderly:

- Senior Citizens
- Alzheimer's disease and other neurodegenerative illnesses

Senior Citizens

Promotes the active participation of the elderly in present-day society. To this end Fundación "la Caixa" organises workshops, talks and courses on subjects in the news in its 544 Senior Citizens Centres, 73 of its own and 471 in conjunction with other public administrations. The chief lines of action of this programme are the promotion of volunteerism, intergenerational activities and the use of the new technologies.

The foundation has signed collaboration agreements with regional, provincial and local government institutions in order to boost the Senior Citizens Centres and make them more dynamic through various activities. Part of this programme has been the creation of www.clubestrella.com, a website aimed exclusively at senior citizens.

Alzheimer's Disease and Other Neurodegenerative Illnesses

Since 1996, this programme focuses on Alzheimer's disease and other neurodegenerative diseases, such as Parkinson's and multiple sclerosis, with the aim of providing information regarding the seriousness of the disease and of improving, insofar as this is possible, the quality of life of those affected. As part of this programme, the foundation collaborates with associations of families of Alzheimer patients throughout Spain. Since the programme began, it has established 446 cooperation agreements with these organisations. In addition, the foundation organises a wide variety of activities, ranging from sessions and workshops for the cognitive stimulation of patients, to symposia and conferences that deal with the different aspects of the disease and strive to provide support for family members. The foundation also programmes activities that give caregivers a period of rest and relaxation.

The foundation also promotes the development of research projects dealing with neurodegenerative diseases such as Alzheimer's, Parkinson's and multiple sclerosis through an annual competition for research grants. Since 1997, the foundation has provided financial backing for the work of 65 Spanish research teams.

TYPES OF SUPPORT

Conferences/seminars
Educational/training programmes
Fellowships
Publications
Public awareness campaigns
Research

LANGUAGES ACCEPTED

Spanish and local languages

TYPE OF FUNDER

Corporate foundation

GOVERNANCE

Board of Trustees

Josep Vilarasau i Salat, President
Salvador Gabarró Serra, Vice-President
Jordi Mercader Miró, Vice-President
Isidre Fainé Casas, Vice-President
Antoni Brufau Nuibó, Vice-President
Alejandro Plasencia García, Vice-President
Josep Zaragoza Alba
Manuel García Biel

Francesc Tutzó Bennasar
 Rosa Novell Bové
 Amparo Camarasa Carrasco
 Vicenç Oller Compañ
 Ramon Balagueró Gañet
 Javier Godó, Conde de Godó
 Luis Rojas Marcos
 Justo Novella Martínez
 Anton Pie Mestre
 Maria Isabel Gabarró Miquel
 Magí Pallarès Morgades
 Lluç Tomás Munar
 Manuel Raventós Negra
 Montserrat Orriols Peitívi
 Miquel Noguer Planas
 Ricard Fornesa Ribó
 Begoña Gortázar Rotaèche
 Jaume Iglesias Sitjes
 Federico Mayor Zaragoza

STAFF

Josep Vilarasau i Salat, President
 Alejandro Plasencia i García, Director of the
 Community Projects
 Antoni Aliana i Magri, Deputy Director
 General
 Aurora Sanz i Manrique, Deputy Director
 General
 Lluís Reverter i Gelabert, General Secretary
 Cristina G. Langarika i Solorzano, Director,
 Communications
 Carme Guinea i Comas, Director,
 Programmes
 Glòria Trias i Salas, Director, Social and
 Assistance Project
 Isabel Martínez i Torralba, Director, Social
 and Educational Project
 Alberto Soria i Casas, Director, Human
 Resources
 Esther Planas i Herrera, Director, Resources
 and Services

PUBLICATION TYPES

Annual report
 Electronic/online information
 Information brochures
 Periodical

FINANCIAL INFORMATION

	2003	EURO	EURO
Total Assets	342,670,000	342,670,000	
Total Exp.	179,480,000	179,480,000	

AFFILIATIONS

EFC Member

(Sources of information: Website; Annual Report 2002; Verified by funder)

FUNDACIÓN MARÍA FRANCISCA DE ROVIRALTA

YEAR OF 1959

ESTABLISHMENT

PRIMARY ADDRESS

20-24 Tuset
 08006 Barcelona
 Spain
 Tel.: +34.93.217.7700
 Fax: +34.93.217.8221
 E-mail: fundacion@roviralta.org
 Web: www.roviralta.org

KEY CONTACT

Gerado Salvador, President

NAME IN ENGLISH

Roviralta Foundation

MISSION

To support social issues in line with the foundation's mandate by supporting and cooperating with organisations having similar interests. The foundation pursues a participatory and cooperative approach to realise synergies and to optimise the utilisation of available resources.

GEOGRAPHIC FOCUS

Spain

PROGRAMME AREAS

The foundation runs the following four programmes to achieve its aim of supporting social issues:

- Social assistance
- Health care and medical research
- Education, scientific and technical research
- Culture and arts

Social Assistance

More than half of the foundation's grants go to this area. The foundation supports organisations that aid the weakest and most underprivileged groups in society: children; youth; the elderly; the physically and psychologically disadvantaged; and the socially excluded. It helps with the provision of job creation schemes. The foundation supports the improvement of local facilities and services; the provision of equipment and transportation; cultural centres; and the implementation of computer science equipment adapted for use by disabled people.

Health Care and Medical Research

Supports hospitals and health research projects.

Education; Scientific and Technical Research

Provides grants for training in technical and scientific research centres and grants to individuals and students in very specific cases.

Culture and Arts

Supports specific projects in the fields of culture and the arts.

AGEING ACTIVITIES

Within its Old Age Programme, 39 out of 47 projects focus on the acquisition of geriatric equipment or go some way towards improving the quality of life of the elderly. The foundation also runs a project in Cuba, in collaboration with Fundacion CODESPA and the local branch of CARITAS. This joint project provides vital resources for the nutrition and daily hygiene of approximately 40,000 old people in Cuba living on low incomes who are unable to work. The project also works to develop the creativity and self-esteem of the elderly population and at the same time achieve self-sustainability through manufacture and sale of their own products made in project workshops.

TYPES OF SUPPORT

Research

APPLICATIONS

Initial approach by letter.

LANGUAGES ACCEPTED

Spanish

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Private foundation

GOVERNANCE

Gerado Salvador, President
Augusto Testor, 1st Vice-President
Pilar Anadón, 2nd Vice-President
Dr. Andreas Graf
Javier Serra

STAFF

1 full-time staff
2 part-time staff

PUBLICATION TYPES

Annual report
Electronic/online information

FINANCIAL INFORMATION

2001	EURO	EURO
European-level Exp.	2,310,000	2,310,000
Programme Exp.	3,000,000	3,000,000
Number of grants:	334	

AFFILIATIONS

Centro de Fundaciones - Madrid
Coordinadora Catalana de Fundacions

(Sources of information: Annual report; Website; Verified by funder)

FUNDACIÓN TELEFÓNICA

YEAR OF 1988

ESTABLISHMENT

PRIMARY ADDRESS

Gran Vía 28, 10th floor
28013 Madrid
Spain
Tel.: +34.91.584.0790
Fax: +34.91.584.0789
E-mail: fernando.labad@telefonica.es
Web: www.fundacion.telefonica.com

KEY CONTACT

Fernando Labad Sasiaín, Executive Vice-President

NAME IN ENGLISH

Telefónica Foundation

MISSION

To contribute to the development of the programmes of non-profit organisations aimed at disadvantaged people in society; to improve living conditions of the most unprotected people, such as children, the elderly, or people with disabilities, through the study and development of social applications and health; and to use telecommunications technology to promote equal opportunities through the application of new technologies in learning processes.

BACKGROUND

Fundación Telefónica, previously known as the Art and Technology Foundation, was established in 1988 from the patronage of Telefónica de España S.A.

GEOGRAPHIC FOCUS

Spain, Argentina, Brazil, Chile, Peru, Morocco and international

FORMER NAME

Art and Technology Foundation

PROGRAMME AREAS

The foundation runs programmes in the following areas:

- Education and culture
- Social application of information technologies
- Cooperation and community development
- Development of information society

Education and Culture

Supports education and culture in a variety of ways, including permanent and temporary exhibitions; promoting the Internet in schools and universities; and using technology to promote Spanish linguistic and cultural heritage.

Social Application of Information Technologies

Promotes the social uses of information technologies to help elderly people and people with disabilities. Also operates helplines to assist people with technical difficulties.

Cooperation and Community Development

Promotes social insertion through its work and aims to increase cooperation through its International Solidarity Red programme and promotes the use of new technologies in the field of cooperation. It also provides an emergency helpline. In this area, the foundation provides gifts in kind, such as providing mobile phones for NGOs in Macedonia and Kosovo. Furthermore, it provides 'Solidarity Tales' books for children; awards the Voluntariat Prize and hosts international meetings on culture and peace.

Development of Information Society

Organises meetings and workshops.

TYPES OF SUPPORT

Awards/prizes
Conferences/seminars
Corporate sponsorship
Curriculum development
Employee volunteering
Gifts in kind
Research
Technical assistance

APPLICATIONS

Applications can be made online and must include a clear objective and target audience; budget outlines; a statement of any co-financing; and an explanation of the organisation's previous activities and sources

of funding. Applications must adhere to the mission of the Telefónica Foundation; offer an important role for information technology; focus on the geographical areas where Telefónica is active; and be presented by a non-profit organisation.

LANGUAGES ACCEPTED

Spanish

TYPE OF FUNDER

Corporate foundation

GOVERNANCE

Fernando Abril-Martorell Hernández

Luis Abril Pérez

Joaquim Agut Bonsfills

Eduardo Caride

Francisco de Bergia González

Luis Lada Díaz

Julio Linares López

Calixto Ríos Pérez

Antonio Viana Baptista

STAFF

César Alierta Izuel, President

Fernando Labad Sasiáin, Executive Vice-President

Fernando Villalonga Campos, General Manager

Roberto Velázquez Martín, General Coordinator

Javier Barranco

PUBLICATION TYPES

Annual report

Electronic/online information

Monographs

(Sources of information: Website; Verified by funder)

THE HENRY SMITH CHARITY

YEAR OF ESTABLISHMENT 1628

PRIMARY ADDRESS

5 Chancery Lane

Clifford's Inn

London, EC4A 1BU

United Kingdom

Tel.: +44.20.7320.6884

Fax: +44.20.7320.3842

Web: www.henrysmithcharity.org.uk

KEY CONTACT

Richard Hopgood, Director

MISSION

To support hospitals, hospices and other forms of residential care or provision of health care for those who are sick or in need and for other institutions providing medical assistance for those in financial need; to help poor, aged or sick people or members of the clergy and their spouses, widows, widowers and dependants; to support the rehabilitation and training of disabled persons including disabled ex-servicemen and war widows; to promote moral welfare or social service; to provide relief and rehabilitation to those persons who are or have been slaves or serfs and their dependants who are in need or distress; and to relieve the Poor Kindred of Henry Smith who are in need.

BACKGROUND

The Henry Smith Charity is named after its founder, Henry Smith, a successful salter by trade who purchased estates in various parts of England. During his life he created a number of charitable trusts for the relief of the poor and he died in 1628 leaving his trustees the sum of £2,000. This sum formed the basic endowment of the Henry Smith Charity.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

The foundation works in the following areas:

- Hospitals and medical care
- Hospices and palliative care
- Medical research
- Disability
- Elderly
- Young people
- Drugs and alcohol
- Community service
- Counselling and family services
- Homeless
- Holidays for disabled and poor children

Hospitals and Medical Care

Supports projects providing health care in hospitals and residential care for people who are sick or needy, and projects that provide outreach services such as home care support.

Hospices and Palliative Care

Focuses on hospice care and supports projects providing residential care or health care and projects that involve outreach services, including home care support.

Medical Research

A variety of medical research is included within this category, although the charity does not normally fund mainstream cancer research. Generally, only applications from recognised 'Centres of Excellence' will be considered for support.

Disability

This category covers physical, mental and multiple (physical and mental) disability. Supports the rehabilitation and training of the disabled, which can involve the arts, education and even leisure and recreational activities.

Elderly

Promotes housing and support services for the elderly, including residential care or health care for those who are sick or in need; emotional support such as befriending services and day care centres; physical support such as provision of home repair; and safety equipment among other things.

Young People

Supports young people at risk, including those who are homeless, sick, unemployed, dealing with drug and /or alcohol problems and any other young people in need. Supports leisure or recreational projects, playgroups, and youth clubs in areas of considerable deprivation.

Drugs and Alcohol

Aims to support and rehabilitate people with drug and/or alcohol problems, as well as those people at risk of developing such problems.

Community Service

Promotes moral welfare or social service, including support for the elderly, the homeless, the sick, the disadvantaged, families and/or young people at risk. This includes projects providing employment for the disadvantaged, shelter and necessities of life such as furniture for the homeless, among other things.

Counselling and Family Services

Supports services for the elderly, the homeless, the sick, the disadvantaged, families and/or young people at risk. Supported projects include those that provide advice to a specific group, for example, the long-term unemployed, people living in an area of considerable deprivation, the disabled

seeking employment and projects that provide support services to families at risk.

Homeless

Funds projects that provide practical support to the homeless.

Holidays for Disabled and Poor Children

Funds projects that provide holidays in the country for children from areas of considerable deprivation.

TYPES OF SUPPORT

- Building/renovation
- Capital support
- Educational/training programmes
- Equipment
- Research
- Staff development

APPLICATIONS

Applications for grants can be submitted at any time during the year. Applicants will receive a letter acknowledging their applications within a week of receipt of the application. The trustees meet quarterly in March, June, September and December to consider appeals. For details on application procedures, please consult the foundation's website.

Initial approach by letter.

RESTRICTIONS

Please consult website for details on funding restrictions.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered charity no. 230102

GOVERNANCE

Trustees

- J.J.L.G. Sheffield, Chair
- A.E. Allen
- D. Barran
- Lord Egremont
- Countess of Euston
- Viscount Gage
- M.J. Gallyer
- J.D. Hambro
- Lord Hamilton of Dalzell
- T.D. Holland-Martin
- Sir John James
- C. Godman Law
- G.E. Lee-Steere
- M. V. Lowther

T.J. Millington-Drake

M.R. Newton

R. S. Norman

P.W. Smallridge

P.W. Urquhart

STAFF

- Richard Hopgood, Director
- Virginia Graham, Grants Administrator
- Tom Sterry, Financial Accountant
- Alastair Marr, Trust Secretary
- Michele Arnal, Senior Grants Coordinator
- Jo Halpin, Database Officer
- Cinnamon Coe, Assistant Grants Officer
- Elizabeth Lambden, Personal Assistant to the Director & Head of Grants
- 9 full-time staff

PUBLICATION TYPES

- Annual report
- Application guidelines
- Electronic/online information

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	572,095,000	808,614,841
Total Exp.	23,320,000	32,961,131
Grants Exp.	21,639,000	30,585,159
Number of grants:	594	

SOURCES OF FUNDS

Investments and property.

NOTES ON FINANCIAL INFORMATION

For financial year ended December 31st 2003.

(Sources of information: Annual Report 2003; Website; Verified by funder)

HERMAN BOUMA FONDS VOOR GERONTECHNOLOGIE STICHTING

YEAR OF not available

ESTABLISHMENT

PRIMARY ADDRESS

Neerlandstraat 37
5662 JB Geldrop
Netherlands
Web: www.gerontechnologie.nl

KEY CONTACT

Prof J.E.M.H. van Bronswijk, Chair

NAME IN ENGLISH

Herman Bouma Fund for Gerontechnology
Foundation

MISSION

To encourage new, high quality scientific research towards the maintenance of good health, social participation and comfortable independence for all people up to a high age.

BACKGROUND

Gerontechnology is an interdisciplinary field of scientific research in which technology is directed towards the aspirations and opportunities of the elderly. Gerontechnology aims at good health, full social participation and independent living up to an old age, through research, development and design of products and services to increase the quality of life.

Gerontechnology lies at the crossroads between advancing technology and advancing age.

GEOGRAPHIC FOCUS

Netherlands and worldwide

PROGRAMME AREAS

The foundation is active in the following:

- Grants and scholarships
- Conventions and conferences
- Publishing

Grants and Scholarships

Promotes Gerontechnology nationally and through forging international links. Supports young, promising researchers in this area with yearly grants for travelling or research scholarships. Furthermore, the foundation promotes other activities directly or indirectly related to its objectives. The aim is to award two grants each year; one grant of 2000 euros and one grant of 1000 euros. Proposals are reviewed by the grant committee.

Conventions and Conferences

These are held on issues in Gerontechnology and may be national or international events.

Publishing

Produced 'Gerontechnology: why and how?', the first textbook on theory and practice of this rapidly developing interdiscipline. Uses insight and experience from many different scientific domains as well as from older people themselves, to discuss the path towards a longer, healthy and independent life for humans.

TYPES OF SUPPORT

Conferences/seminars
Grants to individuals
Publications
Research
Scholarship
Student aid

APPLICATIONS

Initial approach by letter.

LANGUAGES ACCEPTED

Dutch and English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered with the Chamber of Commerce
Oost-Brabant (#1711 2801)

GOVERNANCE*The Board*

Prof J.E.M.H. van Bronswijk, Chair

J.A.M. Graafmans, Secretary

J. Rietsema, Treasurer

Prof H. de Ridder, Member

Grant Committee

Prof H. Bouma, Chair

W.G. Koster, Member

C.A. Vermeulen, Member

PUBLICATION TYPES

Conference/meeting report
Electronic/online information
Publications in two or more languages

SOURCES OF FUNDS

The foundation acquires its assets through donations, testamentary dispositions and legacies. The incoming gifts are added to the capital of the foundation. Interest on the capital is used to support gerontechnology projects, specifically in the form of travel grants and research stipends.

(Sources of information: Website)

JOHNSON & JOHNSON

FUNDING SINCE 1986

PRIMARY ADDRESS

Lenneke Marelaan, 6
1932 Brussels
Belgium
Tel.: +32.2.749.2591
Fax: +32.2.749.2519
E-mail: fwelvaer@jppbe.jnj.com
Web: www.jjeurope-csr.com

KEY CONTACT

Frank Welvaert, Director Corporate Social Responsibility, Europe

MISSION

To invest in innovative health care projects today that help ensure the world a healthy tomorrow.

BACKGROUND

Johnson & Johnson is the world's most comprehensive and broadly-based manufacturer of health care products, as well as a provider of related services for the consumer, pharmaceutical and professional markets. The Johnson & Johnson family of companies, consisting of more than 200 operating companies in 54 countries, has its worldwide headquarters in New Brunswick, New Jersey, US, where the company was founded over a century ago. The company currently employs 108,500 people.

GEOGRAPHIC FOCUS

Worldwide, with emphasis on projects in communities where the company operates.

PROGRAMME AREAS

Grants relate to four core areas:

- Community responsibility
- Children's health
- Access to care
- Advancing health care knowledge

Community Responsibility

- Business and Society Belgium: an action and business-driven network that promotes corporate social responsibility (CSR) aims as drivers for change and seeks to become the Belgium's CSR reference centre
- Network for Training Entrepreneurship (NFTE), Belgium: a non-profit organisation that promotes the social integration of youth at risk and disadvantaged youngsters

- School for Leaders Association is committed to the development of society in Poland and Central-Eastern Europe. To fulfil this commitment, the association offers promising youngsters training in leadership skills and supports social and governmental community activities

Children's Health

The improvement of the health of children is one of the main aims in Johnson and Johnson's credo, and the company therefore sponsors a wide range of initiatives, often in partnership with national foundations, including:

- Medusana Stiftung in Germany: develops health care programmes, health care education and consulting services for school children aged 9-14. It also collaborates with physicians associations and health insurance companies to coordinate health education projects and initiatives
- Barretstown Gang Camp in Ireland: benefits seriously ill children through its international summer camp programme. Children who participate are exposed to emotionally and physically challenging therapeutic, recreational, and social activities, which improve their level of confidence and help foster new friendships

Access to Care

Johnson and Johnson is involved in a wide range of programmes in this field throughout the world. Examples of initiatives include:

- The Healthy Birth and Growth project in Portugal: helps reduce health risks for mothers and babies by improving the quality of basic health care, feeding, hygiene and comfort for pregnant women, babies and children
- Our Child Foundation in the Czech Republic: provides specialised services for children that have been abused and offers crisis intervention
- Youth Health Centres in France: improves access to health services for young people
- The Spanish Centre of Information and Training on Mental Health (CEIFEM): guides people with a mental illness and their families, and to provide information to professionals, public authorities and the population as a whole. The centre now

provides a range of services including information resources, legal advice, a documents library, training courses and information bulletins

- Johnson & Johnson Health Care Fund, King Baudouin Foundation in Belgium: provides grants to non-profit organisations in Belgium, Luxembourg and the Netherlands, that address the special health concerns of children and people who are at risk of not receiving any health care
- The Alzheimer association in Germany: provides help and information for patients and carers in the district of Neuss
- Europa Donna in Slovenia: raises public awareness of breast cancer and mobilises the support of European women in pressing for better physical and psychological care and treatment and for more resources for breast cancer research
- Pro Mente (Coming Up for Air) in Austria: gives people with mental illness and their families a chance to rediscover and experience their own sense of pleasure by organising one-week holidays for them

Advancing Health Care Knowledge

- The European Health Management Programme: provides a select group of health care professionals with an educational experience which will equip them to play significant leadership roles in the rapidly changing world of health care
- Project Hope: health care management for middle managers in the health care systems of the Czech Republic, Hungary, Latvia and Estonia
- The Johnson & Johnson/King's Fund Nursing Leadership Programme in the UK: emphasises personal impact and learning through experience
- The Semmelweis University Health Services Management Training Centre in Hungary: assists the development of health services in Hungary by generating better management knowledge and practice
- Junior Achievement in Ireland: encourages children to participate in educational programmes to help

understand and value free enterprise, global business and economics

AGEING ACTIVITIES

Examples of country specific organisations and projects funded by Johnson & Johnson Europe include:

- Belgium
- Germany
- Ireland
- Netherlands
- Portugal

Belgium

- Université Catholique de Louvain (UCL) School of Public Health, Brussels: an integrated care programme for the elderly, with the identification of local health care requirements and health care networks to improve coordination
- Vereniging voor Solidariteit (vzw VVS), Leve de Ouderen, Antwerp: provides residents of care homes for the elderly, who are in the early stages of dementia, with friendship by introducing deprived teenagers as visitors
- Dementia Expertise Centres: five residential care facilities were appointed in 2000 by the Flemish Regional Government as Dementia Expertise Centres. They help a wide range of groups gain a better knowledge of dementia. The centres act as contact points for professionals and as resource centres for anyone concerned with the provision of information and guidance. Target groups include dementia patients and their families, health care professionals including general practitioners and pharmacists, emergency services, the courts and welfare workers
- Circle of Care: an interactive modular seminar programme designed for relatives caring for dementia patients suffering from Alzheimer's disease. Through a structured sequence of seminars and discussions with experts and other people similarly affected, the programme aims to lessen the burden of care and to delay the institutionalisation of the patients — providing a significant improvement in the quality of life for both carers and patients

Germany

Supports Alzheimer Gesellschaftskreis Neuss E. V./Nordhein, an association that provides help and information for patients and carers. To date some 750 people contacted the consulting centre, just under half from outside of the district of Neuss. Help is provided as information about dementia disease and its physical, legal and social aspects. Consultation and assistance is given concerning help with care and the selection of geriatric nursing homes. Innovative methods of therapy are introduced and meetings arranged with doctors and medical professionals. Further activities include enlightening the public, politicians and local authorities on the social effects of dementia disease, promoting understanding by the patients and their families and setting up networks between them through, for example, Circle of Care seminars.

Ireland

Supports the Older People's Peer Advocacy Service, an initiative that helps elderly members of the community express their needs "in their own voices" and obtain the support and services they are entitled to.

Netherlands

The Johnson & Johnson Health Care Fund in the Netherlands is administered by the Oranje Fonds and provides support for a wide range of local projects:

- Stichting Service Plus Noord-Holland, Noord-Schagen: gives practical help and support to more vulnerable people living on their own, namely the elderly, handicapped or chronically ill
- Stichting Welzijn Ouderen Zwolle: funding was provided for a sports day run by this organisation, which facilitates and encourages exercise among the retired community to improve the well-being and self-sufficiency of the elderly
- Thebe, programmes on "physical activity and health for risk groups of elderly and chronically ill people" are supervised by trained exercise instructors. They include programmes on coping with osteoarthritis of the knee, an exercise-training programme for people with osteoarthritis of the hip, healthy exercising for people following stroke and for their caregivers,

and healthy exercising for people with chronic diseases

Portugal

- Marinha's Social Well-being Centre: a day-care centre and home help service for the elderly that runs a technical support bank for the community, which loans equipment such as wheelchairs and crutches to improve the quality of life of users and their families
- Santa Casa de Misericórdia de Estômbar, Lagoa: a charitable institution founded in 1531, its aims include meeting social needs. In 2002 this was expressed in a project to provide supplementary support in health care in Lagoa, particularly for patients who, due to their physical or mental state, need constant hospital care. A home and a day-care centre are being completed to provide health care for elderly patients, either at the institution's home or in their own homes

TYPES OF SUPPORT

Educational/training programmes
Employee volunteering/technical assistance
Gifts in kind
Programme development
Research

APPLICATIONS

Unsolicited applications will not be considered.
Initial approach by letter.

RESTRICTIONS

No grants for individuals, trips, endowments, denominational organisations, capital requests or political groups.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Direct corporate citizenship programme

TYPE OF BUSINESS

Health care

GOVERNANCE

Activities in Europe are managed by the European Corporate Social Responsibility Committee which consists of managing directors and senior executives, many of whom have subcommittee responsibilities for their own country or region.

Dirk Collier, Chair

David Brickwood

Werner F. Cermak

Frédéric Champavere

David A. Coates
Christian De La Porte
Athol Grieve
Marcel Mangen
Tom McManus
Pauric O'Grady
Jiri Pavlicek
Eric Petreto
Scott Ratzan
Denis Robson
Massimo Scaccabarozzi
Jose-Luis Sotoca
Paul Stoffels
Stefan Szynaka
Staffan Ternström
Fred Vermeer

STAFF

Frank Welvaert, Director Corporate Social Responsibility, Europe

PUBLICATION TYPES

Annual report
Corporate Contributions Worldwide report
Corporate Social Responsibility Europe report
Electronic/online information
Information brochures

FINANCIAL INFORMATION

2003	US DOLLAR	EURO
Total Exp.	384,500,000	283,366,497
European-level Exp.	14,000,000	10,317,636
Annual Turnover	41,862,000,000	30,851,204,952

SOURCES OF FUNDS

Contributions by the Johnson & Johnson group of companies.

AFFILIATIONS

Conference Board US
European Business Network for Social Cohesion
EFC Funding Member

ADDITIONAL ADDRESSES

Johnson & Johnson World Headquarters
Corporate Contributions
1 Johnson & Johnson Plaza
New Brunswick, NJ 08933
United States
Tel.: +1.908.524.3064
Fax: +1.908.828.3607

(Sources of information: Philanthropy Across Europe; Website; Verified by funder)

JOSEPH ROWNTREE FOUNDATION

YEAR OF 1904

ESTABLISHMENT

PRIMARY ADDRESS

The Homestead
40 Water End
York, YO30 6WP
United Kingdom
Tel.: +44.1904.62.9241
Fax: +44.1904.62.0072
E-mail: enquiries@jrf.org.uk
Web: www.jrf.org.uk

KEY CONTACT

Andrew Barnett, Director of Policy Development and Communications

MISSION

To contribute to research and development projects that offer solutions for better policies and practices that have an effect on the community.

BACKGROUND

One of three trusts established with the wealth of Joseph Rowntree in 1904, the trust was originally called the Joseph Rowntree Village Trust to administer Joseph Rowntree's model village, New Earswick. In 1959, the trust widened its objectives to cover research and development, and the Village Trust was transformed into the Joseph Rowntree Memorial Trust by a private Act of Parliament. The trust was then renamed the Joseph Rowntree Foundation in 1990.

GEOGRAPHIC FOCUS

UK

FORMER NAME

Joseph Rowntree Village Trust; Joseph Rowntree Memorial Trust

RELATED ORGANISATIONS

Joseph Rowntree Charitable Trust; Joseph Rowntree Reform Trust

PROGRAMME AREAS

The foundation is interested in projects that directly contribute to identifying possible solutions to problems, developing or evaluating potential schemes on the ground, and directly working with partners to secure change. The foundation funds research and development activities in the following areas:

- Housing and neighbourhoods
- Poverty and disadvantage

- Differences in parenting
- Independent living
- Drug and alcohol research programme
- Governance and public services
- Immigration and inclusion

Housing and Neighbourhoods

The Housing and Neighbourhood Committee focuses on the impact of ‘place’ and ‘poverty’ which reflects the core concerns of Joseph Rowntree and his son, Seebohn, to search for better ways of tackling poor living conditions and social disadvantage.

Poverty and Disadvantage

The Poverty and Disadvantage Committee explores the factors that contribute to poverty; factors that keep people out of poverty; groups and individuals that experience poverty; factors or measures that can help to reduce or eradicate poverty. Also identifies barriers and solutions to this ongoing problem.

Differences in Parenting

Seeks to improve understanding of diversity in parenting; considers the implications of these differences for inequalities in outcomes for children; and studies how parenting is supported and assessed in public policy and practice.

Independent Living

Identifies the key barriers to achieving person-centred support of older people, disabled people and service users. Also identifies approaches to address these barriers, which will have credibility with users and viability in policy and practice.

Drug and Alcohol Research Programme

Takes forward work on the social dimensions of substance abuse.

Governance and Public Services

Explores key issues of local governance, including the most effective ways for citizens and communities, especially those in disadvantaged areas, to engage in the processes of governance for the planning and delivery of key services.

Immigration and Inclusion

Explores processes and experiences of short and long-term settling for newer migrants, focusing on those who face particular social and economic disadvantage in the UK; seeks evidence of solutions in maximising the benefits of migration (locally, regionally and

nationally) to migrants and to wider communities and society; creates opportunities for safe and informed discussions on key policy and social issues; and works with others to improve ways of thinking about the issues, data sources, policy making, research approaches and public opinion.

AGEING ACTIVITIES

Elements of some of the foundation’s research and development activities target the elderly. These include:

- Independent Living
- Care of Older People
- Older People’s Programme

Independent Living

Seeks to identify and understand the range of diverse barriers to achieving person-centred support for older people, among others. The programme is currently reviewing what has been learned to date about the potential for user-defined ideas of quality, for choice and control for people in a residential or nursing home setting. This draws together an understanding of the difficulties that people in residential and nursing homes can face and, crucially, identify plausible approaches for choice and control (either genuine empowerment within a residential home setting or in terms of routes out into a community setting).

Care of Older People

Seeks to identify, encourage and build consensus around the implementation of a sustainable model for meeting the costs of long-term care throughout the UK.

The Foundation’s 1996 inquiry, suggested that the most rigorous and sustainable model for funding long-term care would be a ring-fenced, compulsory National Care Insurance Scheme. However, a key element of the programme is to test this model and others in the current political and policy context. As an outcome, it is consistent with the foundation’s commitment to identifying and addressing social inequalities. Meeting the costs of older people’s care is, in JRF’s view, a key component of a caring, wealthy and civilised society.

Older People’s Programme

Since 2000, the foundation has been supporting a programme of research about the lives of older people. The programme

was developed by and with older people themselves, working in a steering group with officers, researchers and policy advisers. Rather than focusing on the views of professional researchers and service planners, the programme examined the priorities which older people themselves defined as important for 'living well in later life'. The foundation's website summarises the main findings from 18 completed projects and identifies key themes for policy-makers, practitioners, researchers, society as a whole, and for older people themselves.

TYPES OF SUPPORT

Funder-operated programme
Research

APPLICATIONS

See website for application procedures, contacts, and dates.

RESTRICTIONS

Supports UK projects only. Support is not provided for buildings or equipment; running costs for housing, community development or social care projects; educational bursaries or sponsorship for individuals for further education and training courses or personal research; or sponsorships for individuals in need. Some programmes are closed to external applicants.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Company limited by guarantee

HONORARY/ADVISORY COMMITTEE

Sir William Utting, Chair
Debby Ounsted, Deputy Chair
Dame Ann Bowtell DCB
Catherine Graham-Harrison
Susan V. Hartshorne
Ashok Jashapara
Robert Maxwell CVO CBE
Bharat Mehta
Nigel Naish
Tony Stoller CBE

STAFF

Lord Best OBE, Director
Michael Sturge, Deputy Director and Director of Finance
Cedric Dennis, Business Properties, Director
Anne Harrop, Research, Director

Nigel Ingram, Development and Property Services, Director
John Kennedy, Care Services, Director
David Utting, Public Affairs, Associate Director
Andrew Barnett, Director of Policy Development and Communications
300 full-time staff
200 part-time staff

PUBLICATION TYPES

Annual report
Application guidelines
Conference/meeting report
Electronic/online information
Financial statement
Information brochure
Monographs
Press releases
Publications catalogue/list
Research findings summaries

FINANCIAL INFORMATION

2003	POUND STERLING	EURO
Total Assets	197,014,000	278,465,018
Total Exp.	7,590,000	10,727,915
Grants Exp.	4,665,000	6,593,640

SOURCES OF FUNDS

Property sales, endowments/investments and publication sales.

AFFILIATIONS

Association of Charitable Foundations (UK)
EFC Member

(Sources of information: Annual Report 2002; Website; Verified by funder)

KÖRBER-STIFTUNG

YEAR OF 1959

ESTABLISHMENT

PRIMARY ADDRESS

Kurt-A.-Körber-Chaussee 10
21033 Hamburg
Germany
Tel.: +49.40.72.50.2457
Fax: +49.40.72.50.3645
E-mail: info@stiftung.koerber.de
Web: www.stiftung.koerber.de

KEY CONTACT

Dr Klaus Wehmeier, Deputy Chairman of the Executive Board

NAME IN ENGLISH

Körber Foundation

MISSION

To support people, promote cross-cultural understanding and set examples for the future.

BACKGROUND

The Körber-Stiftung was established in 1959 by the industrialist and inventor, Dr Kurt A. Körber. Dr Körber founded Hauni-Werke in Hamburg-Bergedorf in 1946, which has since developed into the Körber AG group with 28 companies worldwide. In accordance with his will the foundation became sole shareholder of Körber AG after his death in 1992.

GEOGRAPHIC FOCUS

Germany, US, Turkey, and Central and Eastern Europe

RELATED ORGANISATIONS

Körber AG

PROGRAMME AREAS

The foundation initiates, finances and runs its own projects within the following areas:

- International dialogue
- Education and science
- Civic involvement
- Culture in Hamburg

Specific activities include:

- Bergedorf Round Table: the foundation's senior project that provides a platform for open discourse, bringing together politicians, scientists, business people and publicists to openly discuss fundamental contemporary issues
- USable - The Transatlantic Idea Contest: promotes communication with the US regarding innovative ideas and the implementation of these ideas
- German-Turkish Dialog: supports a German-Turkish youth exchange programme; a related summer academy for college students and young scientists of both countries; and symposia on selected issues
- Körber Contact Centre Russia/Commonwealth of Independent States (CIS): in cooperation with the German Society for Foreign Affairs (DGAP), the foundation has set up a clearing house that collects information about political, economic, and social developments in Russia and other states of the former Soviet Union
- EUSTORY - History Network for Young Europeans: supports the development of

student competitions at the European level, particularly in former socialist countries

- German Student Award: promotes links between education and research, interdisciplinary cooperation and communication between institutions of higher education and non-academic sections of society. Prizes are presented to students in all fields
- Körber European Science Award: seeks to provide outstanding researchers working in Europe with optimal conditions for collaborating on pioneering projects
- The Federal President's History Competition: asks young people between the ages of 8 and 21 to investigate traces of history in their own communities and to document their findings
- Haus im Park Theatre: run by the foundation, this theatre has held more than 100 performances by famous theatre groups and cabaret acts. Entertainment events are shown throughout the year
- International Opera Studio: provides an opportunity for highly talented young opera singers to receive systematic training for their future careers, in cooperation with the Hamburg State Opera
- Boy Gobert Prize: awards outstanding young stage actors
- Körber Photo Award: awards outstanding young photographers
- *Haus im Park* Senior Citizens' Centre: seeks to bring a little more colour into the lives of the elderly by providing the senior citizens of Bergedorf with special services to help them master their everyday lives with verve and spirit

AGEING ACTIVITIES

With its varied programme, the Haus im Park Senior Citizens' Centre seeks to bring a little more colour into the lives of the elderly. In the spirit of taking good care of both body and soul, the centre offers courses such as foreign languages, sports activities and shared hobbies. This is particularly aimed at people aged 50 and over. Its purpose is to support those who like to take their leisure time into their own hands. The centre's 'chat café' provides an opportunity to discuss topics of current interest. Once a month, a

multi-cultural gathering takes place at the German-Turkish 'tea-time'.

TYPES OF SUPPORT

Awards/prizes
Conferences/seminars
Funder-operated programmes
Research

RESTRICTIONS

The foundation finances and runs its own projects. No grants to individuals.

TYPE OF FUNDER

Independent foundation

GOVERNANCE

Executive Board
Christian Wriedt, Chair
Dr Klaus Wehmeier, Deputy Chair
Dr Wolf Schmidt

HONORARY/ADVISORY COMMITTEE

Ulrich Voswinckel, Chair
Dr Sabine Bergmann-Pohl, Deputy Chair
Eberhard Reuther
Prof Dr Dagmar Schipanski
Reinhard Stuth
Detlev Terboven
Prof Dr Fitz Vahrenholt

PUBLICATION TYPES

Electronic/online information
Information brochures
Multi-year report
Newsletter

FINANCIAL INFORMATION

2002	EURO	EURO
Total Assets	516,000,000	516,000,000
Total Exp.	13,800,000	13,800,000

AFFILIATIONS

EFC Funding Member

ADDITIONAL ADDRESSES

Hauptstradtbüro/Berlin Office
Neustädtische Kirchstraße 8
10117 Berlin
Germany
Tel.: +49.30.20.62.6760
Fax: +49.30.20.62.6767

(Sources of information: Information brochures; Körber-Stiftung Aktuell; Reflexion und Initiative; The Körber Foundation - A Portrait; Website; Verified by funder)

KUNTOUTUSSÄÄTIÖ

YEAR OF 1945

ESTABLISHMENT

PRIMARY ADDRESS

*Head Office, Rehabilitation Services,
Training and Information*
Pakarituvantie 4-5
P.O. Box 39
00411 Helsinki
Finland
Tel.: +358.9.5.3041
Fax: +358.9.566.3038
Web: www.kuntoutussaatio.fi

KEY CONTACT

D.Soc.Sc. Veijo Notkola, General Manager

NAME IN ENGLISH

Rehabilitation Foundation

MISSION

To enhance the working and functional capacity of the working aged, as well as to develop equal opportunities for people with disabilities in working life and in the social context as a whole.

BACKGROUND

Kuntoutussäätiö traces its roots back to the Foundation for Occupational Medicine which was founded in 1945.

GEOGRAPHIC FOCUS

Finland

FORMER NAME

Foundation for Occupational Medicine

PROGRAMME AREAS

The Rehabilitation Foundation is a diverse centre of expertise and development in the fields of rehabilitation, health and working life. These goals are attained through:

- Rehabilitation services
- Research and development
- Training

Rehabilitation Services

Develops new rehabilitation methods using a resource-oriented approach, and relies on multi-disciplinary teamwork. Rehabilitation plans are prepared, carried out and followed up in cooperation with the workplace of the person in rehabilitation. The rehabilitation team includes a medical doctor, a psychologist, a social worker, a physiotherapist, and other experts. The most important rehabilitation services include an assessment of needs and working capacity;

vocation-oriented early rehabilitation; training to maintain and to improve working capacity; training courses for empowering those at risk of social exclusion; work try-outs and job coaching; resource-oriented psychotherapeutic counselling; rehabilitation for heart patients; training for adults with reading and writing difficulties; and sheltered work for people with mental problems and learning disabilities.

Research and Development

Aims to generate new knowledge and identify good practices in order to improve and maintain peoples' functional and working capacity and life control, to enhance employability, empowerment and well-being; to prevent social exclusion; and to develop supportive environments to evaluate and study the system of rehabilitation in Finland. This objective is fulfilled through a number of initiatives including generating new and applicable knowledge on disability or marginalisation processes and their prevention; by developing and evaluating medical, psychological, social and occupational/vocational rehabilitation measures and models; and by evaluating and critically examining the functions of and services produced by the Finnish rehabilitation system.

Training

Offers training for all professional groups working in the field of rehabilitation, employment service, and social and health care. Training varies from one to two day seminars to national conferences and extensive university-level courses, which are arranged in cooperation with universities and other domestic and international institutes. The annual National Congress has been organised since 1973. The scientific library belongs to the network of research libraries.

AGEING ACTIVITIES

Meeting the Needs of Working Aged People

The foundation is a diverse centre of expertise and development in the fields of rehabilitation, health and working life. It seeks to enhance the working and functional capacity of the working aged, as well as to develop equal opportunities for people with disabilities in working life and in the social context as a whole.

These goals are attained through: innovative rehabilitation and rehabilitating work; research and development; and training and information services.

TYPES OF SUPPORT

- Collections/acquisitions
- Conferences/seminars
- Curriculum development
- Educational/training programmes
- Funder-operated programmes
- Professor/faculty development
- Research

LANGUAGES ACCEPTED

- Finnish

TYPE OF FUNDER

- Governmentally-linked foundation

LEGAL STATUS

- Non-profit organisation

GOVERNANCE

- The foundation is governed by a board of representatives appointed by:
 - The Central Organisation of Trade Unions
 - The Confederation of Finnish Industry and Employers
 - The Finnish Association for Mental Health
 - The Finnish Pension Alliance
 - The Insurance Rehabilitation Association
 - The Ministry of Social Affairs and Health
 - The Social Insurance Institution

STAFF

- D.Soc.Sc. Veijo Notkola, General Manager
- Dr. Vuokko Hupli, Medical Director
- D.Soc.Sc. Aila Järvikoski, Research Director
- Johnny Gädda, Chief of Economy and Administration
- Anna-Liisa Öfverberg, Manager of Sheltered Workshop
- 100 full-time staff
- 30 part-time staff

PUBLICATION TYPES

- Electronic/online information
- Monographs

FINANCIAL INFORMATION

2001	EURO	EURO
European-level Exp.	28,490	28,490
Programme Exp.	502,765	502,765

SOURCES OF FUNDS

Two thirds of the annual revenue comes from third-party sources such as social insurance, labour administration, occupational health services, and municipal social and health service. One third of the revenue is covered by Finland's Slot Machine Association.

ADDITIONAL ADDRESSES

Research and Development
Paasivuorenkatu 5b
00530 Helsinki
Finland
Fax: +358.9.7740.1729
E-mail: rd@kuntoutussaatio.fi

(Sources of information: Website; Verified by funder)

THE NUFFIELD FOUNDATION

YEAR OF 1943

ESTABLISHMENT

PRIMARY ADDRESS

28 Bedford Square
London, WC1B 3JS
United Kingdom
Tel.: +44.20.7631.0566
Fax: +44.20.7323.4877
E-mail: info@nuffieldfoundation.org
Web: www.nuffieldfoundation.org

KEY CONTACT

Anthony Tomei, Director

MISSION

To 'advance social well being', particularly through research and practical experiment. The foundation aims to achieve this by supporting work which will bring about improvements in society, and which is founded on careful reflection and informed by objective and reliable evidence.

BACKGROUND

The Nuffield Foundation was established in 1943 and by William Morris (Lord Nuffield), the founder of Morris Motors.

GEOGRAPHIC FOCUS

UK and British Commonwealth, and southern and eastern Africa

PROGRAMME AREAS

The foundation provides grants for research purposes, practical innovation or development, often in voluntary sector organisations. The foundation also funds a number of programmes that are targeted towards specific purposes; some provide support for scientists and social scientists at the early stages of their careers, others support particular kinds of projects or people. The Foundation sets up and runs projects of its own; the three largest are the Nuffield

Council on Bioethics, the Nuffield Languages Programme and the Nuffield Curriculum Centre.

AGEING ACTIVITIES ACTIVITIES

The foundation funds work that starts from the perspectives, needs and interests of the older person and his or her family, rather than those of service providers. It is interested in projects that will enhance individual autonomy and choice and that recognise variation in preferences and provision. The foundation is keen to support work that brings an international comparative perspective to bear, and is particularly interested in fostering work that considers European as well as other countries' perspectives.

Issues that might be of interest include:

- The financial circumstances of elderly people and economic planning for later life, including planning for long-term care, pensions and insurance, pension splitting on divorce, intergenerational transfers. It is particularly interested in projects that recognise the complex relationship between state, private and family provision.
- Family solidarity and family obligations, including projects focussing on caring responsibilities between generations; their implications for the labour market; legal and social obligations; changing relationships as a result of family change; and ways of supporting family ties
- Autonomy and decision-making in later life, including socio-legal matters such as competence, powers of attorney, conflicts of interest, advance directives and so on. The foundation wishes to foster work that improves autonomy as well as social responsibilities of older people
- Retirement, work and citizenship, including the diverse positions of older people in employment; retirement and employments rights; and activities that promote active citizenship for elderly people.

The Foundation is interested in innovative schemes that support interaction between professionals, informal carers and health and social workers, and notes that there may be particular scope for European comparisons here. Projects that address the relationship

between health and social care will not be considered if they are routine research projects on aspects of service provision.

TYPES OF SUPPORT

Conferences/seminars
Curriculum development
Educational/training programmes
Funder-operated programmes
Student aid (general)
Research

APPLICATIONS

Each programme has its own application procedure, applicants should consult the website for specific information.
Initial approach by letter.

RESTRICTIONS

The foundation does not make grants for the following:

- General appeals; capital or building costs; and the establishment of chairs or other permanent academic posts
- Voluntary sector running costs; activities that are mainly of local interest; or the replacement of statutory funding
- Medical research; research that is mainly of theoretical interest; student fees; attendance at academic conferences; expeditions or travel; and academic journals
- The provision of health or social services or health care, including counselling
- The arts; religion; museums, exhibitions and performances; sports and recreation; conservation, heritage or environmental projects; and animal rights or welfare
- Individuals in distress

The foundation makes grants only to UK organisations, although the Trustees are keen to support work that brings an international comparative perspective to bear, and particularly interested in fostering work that considers European as well as other countries' perspectives.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Endowed UK registered charitable trust

GOVERNANCE

Trustees

Baroness O'Neill, Chair

Sir Tony Atkinson
Dr Peter Doyle
Lord May of Oxford
Prof Genevra Richardson
Prof Sir Michael Rutter
Anne Sofer

STAFF

Anthony Tomei, Director
Sharon Witherspoon, Deputy Director
James Brooke-Taylor, Assistant Director,
Finance and Administration
Dr Catrin Roberts, Assistant Director,
Education
35 full-time staff

PUBLICATION TYPES

Annual report
Application guidelines
Electronic/online information
Financial statement
Grants list

FINANCIAL INFORMATION

2004	POUND STERLING	EURO
Total Assets	208,125,000	294,169,611
Total Exp.	9,737,000	13,762,544
Topic Exp.	26	26
Number of grants:	644	

SOURCES OF FUNDS

Dividends and interest on endowment.

AFFILIATIONS

EFC Member

(Sources of information: Annual report 2003; Application guidelines; EFC membership application form; Website; Verified by funder)

PEOPLE IN NEED TRUST

YEAR OF 1988

ESTABLISHMENT

PRIMARY ADDRESS

Clarendon House
33-37 Clarendon Street
2 Dublin
Ireland
Tel.: +353.1.679.2944
E-mail: pin@telethon.ie
Web: www.telethon.ie

MISSION

To raise funds and make capital grants available in the Republic of Ireland to voluntary social service organisations which provide for, inter alia, the elderly, deprived children, the homeless, persons with

disabilities, disadvantaged areas and other specific needs.

BACKGROUND

The People in Need Trust was established in May 1988 during the Dublin Millennium. While the Trust's initial intention was to focus on Dublin, it quickly became apparent that it would have to take on a nationwide brief. The People in Need Trust is one of a few non-government independent funds operating in the Republic of Ireland.

GEOGRAPHIC FOCUS

Ireland

PROGRAMME AREAS

Grant allocations are decided by major categories of need including:

- Elderly
- Children/young persons
- Mental and physical disabilities
- Homeless
- Multi-purpose
- Other

AGEING ACTIVITIES

Past grants to the elderly have included:

- The Dominican day centre: provides a range of services for the elderly from the area, including a meals-on-wheels service and a drop in centre with activities that enhance the community life of the elderly who use it. The Day Centre also runs a small cottage in Co. Kildare that is used to provide short breaks for elderly people from the area. The cottage is used extensively throughout the year and also at Christmas, when volunteers accompany a group of elderly people who have no family
- St. Josephs', Killorglin: caters for 40 people. The People in Need grant was used to provide an extension to the existing building. The extension has provided a new day room for the residents, as well as an extra bathroom and several small store rooms

TYPES OF SUPPORT

Capital support
Grants to individuals

APPLICATIONS

Grants are made only on the basis of applications submitted.

RESTRICTIONS

One of the fundamental policies of the trust since its inception has been that the funds raised in each county go back in grants to voluntary social service organisations in that county. Grants are for voluntary social service organisations such as those providing services for the elderly, the homeless, deprived children and youth, persons with disabilities and organisations providing services in disadvantaged areas. Grants are available for capital purposes only rather than the normal running costs of organisations. The trust does not entertain requests for or from individuals.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Fund-raising foundation

LEGAL STATUS

The People in Need Trust is a company incorporated under the Companies Act, 1963, limited by guarantee and not having share capital; the trust has been granted charitable status by the Revenue Commissioners (CHY 8441)

PUBLICATION TYPES

Electronic/online information

SOURCES OF FUNDS

RTE, Eircom and telethons every second year, including community events, corporate donations/sponsorship, and private donations.

(Sources of information: Website)

THE RAYNE FOUNDATION

YEAR OF 1962

ESTABLISHMENT

PRIMARY ADDRESS

Carlton House
33 Robert Adam Street
London, W1U 3HR
United Kingdom
Tel.: +44.207.487.9650
E-mail: info@raynefoundation.org.uk
Web: www.raynefoundation.org.uk

KEY CONTACT

Tim Joss, Director

MISSION

To support work of national importance which helps society's most vulnerable or

disadvantaged individuals, especially children, young people and the elderly.

BACKGROUND

The Rayne Foundation was established in 1962 by Lord Rayne whose vision remains at the heart of the foundation's grant-giving. It is a grantmaking trust and a registered charity, the administration of which is provided as a donation in kind through London Merchant Securities plc.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

The foundation supports projects in the following areas:

- Arts
- Education
- Health and medicine
- Social welfare and development

Arts

Support all types of art and culture. The foundation's current areas of special interest in this sector are:

- Building projects for performance/display/conservation facilities (but not building maintenance or repairs)
- Specialist arts-education organisations or the education department of general arts organisations which help children and young people with the transition between the different levels of formal education

Education

Supports education at all levels, formal and informal. We believe it is important that people achieve high levels of attainment and that their education is well-rounded. Current interests are:

- Bursaries towards student fees or maintenance grants offered by individual university departments and academic institutes for study leading to a taught post-graduate degree
- Encouraging participation by individuals with special physical, learning or emotional needs to take part in structured 'year out' placements organised by charities
- Support towards the costs (fees or maintenance) of the retraining in the UK of refugees who are professionally qualified abroad

Health and medicine

Funds projects to improve the people's health and to support the development of medical treatment. The foundation wishes to support important health or medical areas which are less well supported by other funders.

Supports specific health/medical research projects, especially those of clear benefit to patients, through medical research charities. The foundation's current areas of special interest in this sector include the provision of medical and health care for homeless people; research into the long-term consequences of medical interventions in terms of assessment of quality of life, independent employability, self-worth, participation and achievement.

Social Welfare and Development

Supports all types of social welfare and development work, particularly new ideas to help solve problems, though we are prepared to consider proposals that simply help people in need.

AGEING ACTIVITIES

The foundation supports the Mental Health Foundation in the UK through financial contributions (over three years) towards a practical research project piloting home-visiting pharmaceutical care services aimed at ensuring older people, particularly those suffering depression or dementia, take their drugs correctly, and evaluating the cost/benefit of different care service models.

TYPES OF SUPPORT

Capital support

APPLICATIONS

Applications may be submitted at any time. There are no deadlines. UK registered charities whose proposals meet all the foundation's aims and which fall within one or more of the sectors it supports are asked to send a letter of application to the Director, on no more than four sides of A4 (Stamped, addressed envelope not necessary). The application should include a copy of the full annual report and accounts, but no other enclosure is required at this stage.

Applications by email or fax will not be accepted.

See the foundation's website for full details. Initial approach by letter.

RESTRICTIONS

Does not fund individuals, nor unregistered organisations. The foundation

normally does not fund organisations working outside the UK. National or “umbrella” organisations may be supported. However, the foundation is unlikely to support branches or affiliates unless the national/umbrella organisation endorses the application being made to us.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered charity

GOVERNANCE

Board of Trustees

Lady Rayne, Patron

Hon. Robert A. Rayne, Chair

Lord Bridges

Lord Moser

Professor Dame Margaret Turner-Warwick

STAFF

Tim Joss, Director

Carmen O'Rourke, Assistant

PUBLICATION TYPES

Electronic/online information

FINANCIAL INFORMATION

	POUND STERLING	EURO
Total Exp.	1,500,000	2,120,141

(Sources of information: Website)

ROBERT BOSCH STIFTUNG GMBH

YEAR OF 1964

ESTABLISHMENT

PRIMARY ADDRESS

Heidehofstrasse 31

70184 Stuttgart

Germany

Tel.: +49.711.460.840

Fax: +49.711.460.841094

E-mail: info@bosch-stiftung.de

Web: www.bosch-stiftung.de

KEY CONTACT

Dr Ingrid Hamm, Executive Director

NAME IN ENGLISH

Robert Bosch Foundation

MISSION

To alleviate suffering of all kinds and promote the moral, physical and intellectual development of the people.

BACKGROUND

The Robert Bosch Stiftung GmbH (Robert Bosch Foundation) embodies the philanthropic and social endeavours of its founder, Robert Bosch. About 92% of the common stock capital of Robert Bosch GmbH, amounting to 1.2 billion euros, is held by Robert Bosch Stiftung, which exclusively and directly pursues charitable and non-profit-making activities.

GEOGRAPHIC FOCUS

Germany, France, US, Central and Eastern Europe, and Turkey

RELATED ORGANISATIONS

Robert Bosch GmbH

PROGRAMME AREAS

The foundation's five areas of support, and its scientific and health care institutions in Stuttgart, are dedicated to the following programme areas:

- Science in today's society, research at foundation institutes
- Health, humanitarian aid
- International Understanding I
- International Understanding II
- Youth, education, the civic society

Science in Today's Society, Research at Foundation Institutes

Includes the following in its science activities: youth and technology programme, society and science; junior research group geriatrics; international agricultural and forestry science in Germany; natural healing methods/Hans Walz Foundation; and investigates 'what's necessary in medicine'.

Health, Humanitarian Aid

Focuses on educational reform in nurses' training; advanced and specialised nurses' training; innovative nursing; geriatric rehabilitation; public health in Central and Eastern Europe; and life and ageing.

International Understanding I

Focuses on German-French relations; German-American relations; German-Turkish relations; Promoting International Leaders of Tomorrow programme; 'Building Europe - Shaping the Future' lecture series.

International Understanding II

Focuses on German-Polish relations; German-Czech relations; Central and Eastern Europe; and young people and community service volunteer programmes in Europe.

Youth, Education, the Civic society

This area involves civic commitment and volunteer work; young people and community services volunteer programmes in Germany; school in Germany and Europe; promoting public health at school; educational programmes in history and politics; early childhood education; and art and culture.

AGEING ACTIVITIES

Under its Health, humanitarian Aid programme, the foundation is involved in a range of activities related to ageing. These include:

- Graduate training programme
- Inpatient and outpatient nursing and health care
- Professional exchange projects
- Life and ageing

Graduate Training Programme

The graduate programme 'Multimorbidity in the elderly' is run through the Berlin Free University and the Humboldt University. It aims to help provide answers to the challenges of an ageing society for health care and nursing.

Inpatient and Outpatient Nursing and Health Care

In the 1990's, the foundation introduced the focus area 'New Approaches to Inpatient and Outpatient Nursing and Health Care' to support the growth of innovative and holistic ideas in health care practice, focusing on the young and elderly alike.

Professional Exchange Projects

Supports professional exchange projects in Central and Eastern Europe (CEE) countries which predominantly focus on training in the field of senior citizen services.

Life and Ageing

This is a new focus area which seeks to accompany the process of ageing with preservation of quality of life. Initiatives under this title include improvement of quality of life for people suffering from dementia; palliative care for terminally ill patients; support for projects improving the lives of handicapped retirees; and the 'Future AGE' prize for exemplary projects in the fields of nursing, caring for or designing the surroundings of elderly people. Through the Life and Ageing projects, the foundation also

promotes volunteer work in senior citizen projects and work on the specific problems facing ageing immigrants.

TYPES OF SUPPORT

Awards/prizes
Conferences/seminars
Funder-operated programmes
Scholarships

APPLICATIONS

Specific requirements for foundation-operated programmes upon request. No standard application form. A two-page preliminary request is to be submitted in writing, and must summarise the project idea and its method of financing; the project's relevance to a programme area the foundation funds; possible sources of financing, including those by the applicant; innovative elements; as well as long-term possibilities for financing the project. After careful consideration, the foundation tells the applicant within four weeks if the project is feasible and whether the applicant should submit a formal application.

Initial approach by letter.

RESTRICTIONS

The foundation mainly creates and operates its own programmes. Only a limited number of external proposals are funded. The foundation supports projects of limited duration only. No institutional grants are awarded, nor grants for balancing budget deficits.

LANGUAGES ACCEPTED

German, English and French

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Foundation associated with private company

GOVERNANCE

Board of Trustees

Dr Heiner Gutberlet, Chair
Dr Christof Bosch
Dr Hermann Eisele
Prof Dr Hanna-Barbara Gerl-Falkowitz
Matthias Madelung
Helga Solinger
Eberhard Stilz
Prof Dr Hubert Markl
Prof Dr Reinhold Würth

STAFF

Dieter Berg, Chief Executive
Dr Ingrid Hamm, Executive Director

60 full-time staff
10 part-time staff

PUBLICATION TYPES

Annual report
Electronic/online information
Information brochures
Monographs
Newsletter

FINANCIAL INFORMATION

2004	EURO	EURO
Total Assets	5,068,736,000	5,068,736,000
Total Gifts	1,000,000	1,000,000
Total Exp.	61,333,000	61,333,000
Programme Exp.	49,867,000	49,867,000
Number of grants:	718	

SOURCES OF FUNDS

Dividend on shares paid out by Robert Bosch GmbH.

NOTES ON FINANCIAL INFORMATION

The number of grants is an estimation by the funder. Programme expenditure includes grants expenditure.

AFFILIATIONS

Network of European Foundations for Innovative Cooperation (NEF)
Bundesverband Deutscher Stiftungen
EFC Funding Member

ADDITIONAL ADDRESSES

P.O. Box 100628
70005 Stuttgart
Germany

(Sources of information: Website; Verified by funder)

STEFAN BATORY FOUNDATION

YEAR OF ESTABLISHMENT 1988

PRIMARY ADDRESS

Sapiezynska 10a
00-215 Warsaw
Poland
Tel.: +48.22.536.0200 (03)
Fax: +48.22.536.0220
E-mail: batory@batory.org.pl
Web: www.batory.org.pl

KEY CONTACT

Anna Rozicka, Executive Director
Ewa Kulik-Bielinska, Development & Communication Director

MISSION

To enhance the role and involvement of civil society, promote civil liberties and the rule of law, and develop international cooperation and solidarity.

BACKGROUND

The Stefan Batory Foundation was founded in 1988, as a part of the network of foundations established by George Soros. Cooperating with the network, it has complete autonomy in its decision-making process.

GEOGRAPHIC FOCUS

Poland and Central and Eastern Europe

RELATED ORGANISATIONS

Soros Foundations Network

PROGRAMME AREAS

The foundation's grantmaking programmes focus on areas such as NGO support and civil society, law and youth. The foundation also runs operational programmes in the areas of international cooperation and anti-corruption. Its operations consist of five domestic and six international programmes and the administration of company and donors' advised funds.

Domestic Programmes

- Civil Society: initiates and supports projects aimed at strengthening the role and effectiveness of civil society and designed to increase public participation and a sense of shared responsibility for the quality of Polish democracy
- The Third Sector: supports undertakings aimed to increase the institutional capacity of the non-profit sector; create a favourable legal and fiscal environment for its growth; and develop partnership and cooperation between NGOs and the public and private sector (programme funded by the Trust for Civil Society in Central and Eastern Europe)
- Legal Education: supports initiatives that promote legal education for citizens, and increase their access to justice and legal assistance
- Anti-Corruption: campaigns for greater transparency in public life and takes the initiative in increasing public sensitivity to various forms and aspects of corruption
- Equal Opportunities: supports organisations that work to provide equal access to education for school children

and youth as well as those that strive to overcome the social exclusion of disabled children

International Programmes

- International Cooperation: initiates and carries out undertakings for European integration; promotes experience sharing among the countries of Central and Eastern Europe; and helps to strengthen the role of Polish NGOs in international fora
- Citizens in Action: supports NGOs in Belarus and Ukraine (programme funded by the Ford Foundation)
- Twin Cities Programme: supports partnership projects undertaken by organisations from Polish and German twin cities (programme funded by Robert Bosch Foundation)
- Community Initiatives Partnership Programme: supports joint projects implemented by NGOs from Poland, Germany and the Kaliningrad District
- East East - Partnership Across Borders: supports international projects implemented in the countries of Central and Eastern Europe and Central Asia
- Regional Alcohol and Drug Programme: runs trainings, workshops and seminars on innovative drug and alcohol addiction treatment methodologies for specialists in the countries of Central and Eastern Europe and Central Asia

AGEING ACTIVITIES

Under its Twin Cities Program, the foundation has financed initiatives linked to the elderly. Recently support projects include:

- Third Age University Association Gorzów Wielkopolski Project - Interpersonal Relations in the Process of European Integration: 15 000 Polish zloty towards a series of meetings for senior citizens from Poland and Germany comprising lectures on the European Union, art and music workshops, and German language classes. The project will be supported by lecturers and experts from the Viadrina University in Frankfurt-upon-Oder, and the Collegium Polonicum in Slubice
- Together Charitable Association Zelów Partnership organization: Deutsch-

Polnische Gesellschaft der Graftschaft Bentheim, Neuenhaus

Project: Residents of the Zelów Municipality Meet People from Neuenhaus: 19 000 Polish zloty a series of visits and workshops to discuss problems of the elderly; the aim of the project is to integrate the senior community in both twin towns, and to graft good examples and German experience in working with the elderly and the disabled onto Polish soil

In addition the foundation is also supporting an event entitled 'Self-Help for Elderly and Handicapped People': this meeting seeks to provide a platform for exchange of experiences and best practices in the functioning of rehabilitation facilities, specifically to contribute to the establishment of such facilities in Kaliningrad based on models of high quality service and care provision in Poland and Germany.

TYPES OF SUPPORT

Awards/prizes
Capital support
Conferences/seminars
Educational/training Programmes
Funder-operated Programme
Grants
Programme development (General)
Public awareness campaigns

APPLICATIONS

Grants are awarded on the basis of competitions judged by expert panels. Competition and programme details are published in the press and are placed on the website.

Initial approach by letter.

RESTRICTIONS

No grants to individuals, nor does the foundation support commercial or political activities, or projects connected with national and local state administration.

LANGUAGES ACCEPTED

Polish, English and Russian

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Independent, non-governmental organisation operating as a non-profit foundation with grantmaking and operational programmes.

GOVERNANCE

The Board
Aleksander Smolar, Chair

Klaus Bachmann
Nathalie Bolgert
Miroslawa Grabowska
Prof Jacek Kochanowicz
Jaroslaw Kurski
Andrzej Rychard
Prof Andrzej Ziabicki

HONORARY/ADVISORY COMMITTEE

The Council

Anna Radziwill, Chair
George Soros, Honorary Member
Jan Krzysztof Bielecki
Bogdan Borusewicz
Wojciech Fibak
Prof Bronislaw Geremek
Prof Leszek Kolakowski
Prof Marcin Król
Olga Krzyzanowska
Prof Krzysztof Michalski
Andrzej Olechowski
Prof Zbigniew Pelczynski
Bp Prof Bishop Tadeusz Pieronek
Prof Andrzej Rapaczynski
Prof Hanna Suchocka
Prof Stanislaw Wellisz

STAFF

Anna Rozicka, Executive Director
Ewa Kulik-Bielinska, Information and
Development Director
Alina Muzinska, Financial Director
Programme Directors
Jakub Boratynski, Director, International
Programmes
Lidia Kuczmierowska, Director, Domestic
Programmes
Grazyna Kopinska, Director, Anti-Corruption
Programme
Ewa Woydylo-Osiatynska, Director,
Regional Alcohol and Drug Programme
21 full-time staff
8 part-time staff
10 volunteers

PUBLICATION TYPES

Annual report
Conference reports/proceedings
Electronic/online information
Financial statement
Information brochures
Reports/policy papers on international issues

FINANCIAL INFORMATION

2004	US DOLLAR	EURO
Total Assets	16,400,000	12,086,373
Total Gifts	11,024,641	8,124,874
Total Exp.	7,316,555	5,392,111
Grants Exp.	3,998,982	2,947,146
Programme Exp.	5,344,406	3,938,688

SOURCES OF FUNDS

Open Society Institute - New York and -
Budapest, international foundations, foreign
and domestic corporate and individual
donors, foreign embassies small grants
programmes.

AFFILIATIONS

Council on Foundations
Soros Foundation Network
Polish Donors Forum
Polish NGOs Abroad
EFC Member

*(Sources of information: Website; Verified by
funder)*

STICHTING HET R.C. MAAGDENHUIS

YEAR OF 1570

ESTABLISHMENT

PRIMARY ADDRESS

Herengracht 220
1016 BT Amsterdam
Netherlands
Tel.: +31.206.24.3903
Fax: +31.206.38.2814
E-mail: info@maagdenhuis.nl
Web: www.maagdenhuis.nl

KEY CONTACT

Liesbeth Zwitter, Board Member

NAME IN ENGLISH

The R.C. Maagdenhuis Foundation

MISSION

To give support to children, where sufficient
parental care is lacking, and the elderly in
need.

BACKGROUND

Stichting Het R.C. Maagdenhuis started out
as an Amsterdam based orphanage. Since
1970 it has worked as a grantmaking fund
without own operations.

GEOGRAPHIC FOCUS

The Netherlands, Central Europe and
selected countries in Africa, Asia and
America

PROGRAMME AREAS

The foundation focuses on small-scale support for projects, providing both financial support and advice. Its resources are put to use for:

- Target groups
- Collaboration

Target Groups

Supports social initiatives of organisations that help target groups to fend for themselves better in the long run. It has wide-reaching objectives but focuses particularly on young people and the elderly. In recent years, special emphasis has been placed on projects of/for ethnic minorities and street children. In developing countries, the foundation prefers to support small-scale projects, which have been started by the local population. The foundation supports projects, sometimes with the help of well-known contacts, if it can follow the project, or monitor its progress. Within the region of Amsterdam, projects of local significance are also supported.

Collaboration

Since 1992, the foundation has been in close cooperation with three other coordinating foundations and about thirty co-financers to deal with project applications relating to Central Europe. The foundations have divided the spheres of philanthropic activity between them for maximum efficiency and impact. The foundation's role is to coordinate allocation of donations to Estonia and Lithuania. The responsibility for coordinating the other countries concerned lies with the SKaN Foundation (Slovak Republic, West-Ukraine and Montenegro), the Oranje Foundation (Bulgaria and Latvia) and the Foundation for Children's Welfare Stamps Netherlands (Croatia and Rumania). Recently, Janivo Foundation joined as coordinating foundation with responsibility for Moldova.

AGEING ACTIVITIES

The foundation assists financially in the building and renovation of nursing homes, residential homes and other care structures that cater for the elderly.

The foundation also funds small innovative projects such as Story table (<http://www.storytable.com>), a web interface designed in close collaboration with elderly people, which makes it possible to listen or

play digital clips from a large database. The material contains songs, sounds, images and movies from the 1920s to the 1980s. The clips inspire memories which lead to animated conversations around the Story table. Conversations can be led by facilitators in a residential home, or residents can do everything for themselves. The purpose of the Storytable is to increase the quality of enjoyment in retirement and residential homes. Additional benefits are decreased social isolation and improved memory.

TYPES OF SUPPORT

Gifts
Loans
Technical support

APPLICATIONS

A written application should be sent to the foundation with a complete description of problems to be solved and how this will be achieved, including full financial information.

RESTRICTIONS

Does not provide grants to individuals or running expenses.

LANGUAGES ACCEPTED

Dutch, English, German and French

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Dutch-registered foundation

GOVERNANCE

Members of the Donation Committee for Projects in the Netherlands

Baron van Lijnden van Horstwaerde, Chair
I. Van Lidth de Jeude

J.M.H.A. ter Kuile-van Mierlo

A.A. Smit

P. Ch. Klein Bog

K.H. van den Berg

J.O. de Boer

J. Dijkstra

Members of the Donation Committee for Projects in Central Europe

T.W.M. van Meeuwen, Chair

M.L. Frohn-de Winter

O. Regout

J.W. Lubbers

A. van de Roemer

H. Raemaekers

P. Schlicher

H. van Melick

*Members of the Donation Committee for
Projects in Africa, Asia and South America*

O. Regout, Chair
J.E. van der Does de Willebois
M. van Gelderen
H.J.A. Zwitter
R.L. Haan
J. Andrewes
E.C. de Bouter

STAFF

T.J.M. de Jong, Director
A. Bronk, Senior Staff Member
C. Vis, Senior Staff Member
9 part-time staff

PUBLICATION TYPES

Annual report (including special annual
report on Central Europe)
Application guidelines
Electronic/online information
Grants list
Information brochure
Publications in two or more languages

FINANCIAL INFORMATION

2004	EURO	EURO
Total Exp.	1,550,000	1,550,000
Grants Exp.	1,100,000	1,100,000
Number of grants:	400	

SOURCES OF FUNDS

Interest on endowment.

AFFILIATIONS

EFC Member

*(Sources of information: EFC Membership
Application Form; Website; Verified by funder)*

**STIFTELSEN RIKSBANKENS
JUBILEUMSFOND**

YEAR OF 1962

ESTABLISHMENT

PRIMARY ADDRESS

Tyrgatan 4
11486 Stockholm
Sweden
Tel.: +46.8.5062.6400
Fax: +46.8.5062.6431
E-mail: rj@rj.se
Web: www.rj.se

KEY CONTACT

Mats Rolén, Research Director

NAME IN ENGLISH

The Bank of Sweden Tercentenary
Foundation

MISSION

To support and promote scientific research,
primarily in the humanities and social
sciences.

BACKGROUND

The Bank of Sweden Tercentenary
Foundation was endowed by the Bank of
Sweden in 1962 as an independent
foundation to commemorate the Bank's
tercentenary. In 1993, the Riksdag (Swedish
Parliament) approved the contribution of a
further donation to the foundation aimed at
encouraging research in the humanities and
social sciences.

GEOGRAPHIC FOCUS

Sweden and international

PROGRAMME AREAS

The foundation aims to support scientific
research by awarding project grants to
individual researchers and teams of
researchers. The foundation administers the
following funds and projects:

- Bank of Sweden Donation
- Humanities and Social Sciences Donation
- Awards
- International commitments

Bank of Sweden Donation

The donation is targeted at research that
sheds light on social, cultural, political,
economic and technical changes as far as the
individual is concerned. Priority is given to
fields of research whose funding
requirements are not adequately met in other
ways. Project grants made with this donation
are mainly awarded to individual researchers
in the humanities, social sciences, theology
and law.

Humanities and Social Sciences Donation

Research in the humanities and social
sciences, including theology and law, is the
main focus of the research funded with this
donation. Aims include support for projects
and programmes involving a
multidisciplinary or interdisciplinary
approach; establishment of networks or more
permanent forms of cooperation, nationally
and internationally; promotion of
postgraduate education and researcher
recruitment; and promotion of mobility
among researchers internationally and

between universities/university colleges and other activities. Funds from the Humanities and Social Sciences Donation are intended for large-scale, interdisciplinary projects, the aim being to increase collaboration between researchers from different disciplines and also, if possible, between universities.

Awards

The Nils-Eric Svensson Fund is a scholarship fund that is intended to promote exchanges between young researchers in Sweden and the rest of Europe. The fund aims to enable young Swedish researchers with PhDs in the areas covered by the activities of the foundation to travel to and spend brief periods in outstanding European research environments. The Erik Rönnerberg's Donations stem from a donation received by the foundation in 1992 from Erik Rönnerberg from Fagerdal, Hammerdal, for the promotion of scientific studies by young researchers into ageing and age-related illnesses. A further donation was received from Erik Rönnerberg at the end of 1994, to be used for research into illnesses during the early childhood years. The Karolinska Institute, Stockholm, nominates the holders of the scholarships.

International Commitments

The foundation has an agreement with the Alexander von Humboldt-Stiftung relating to Swedish-German Research Awards for Scientific Cooperation for talented researchers in Sweden and Germany. It also established the Collegium Budapest, in Hungary, in association with research foundations from other European countries. The centre is an international research centre, serving as a meeting place for about 30 researchers, young and old, from the East and the West.

AGEING ACTIVITIES

The foundation is providing one million Swedish Krona (110,916 euros) for the funding of the multidisciplinary project "Survey of Health, Ageing and Retirement in Europe" (SHARE) to which economists, behavioural scientists, epidemiologists and experts on health issues in more than 10 countries are contributing. The aim of the project is to set up a large, longitudinal European database using interview data that can be used to analyse the complex relations

between economic, health-related, mental and social factors influencing the quality of life of the elderly. Some 22,000 Continental European individuals over the age of 50 have been surveyed. Data collected include health variables (self-reported health, physical functioning, cognitive functioning, health behaviour, use of health care facilities), psychological variables (psychological health, well-being, life satisfaction), economic variables (current work activity, job characteristics, opportunities to work past retirement age, sources and composition of current income, wealth and consumption, housing, education), and social support variables (e.g. assistance within families, transfers of income and assets, social networks, volunteer activities) (<http://www.share-project.org/>).

TYPES OF SUPPORT

- Awards/prizes
- Conferences/seminars
- Continuing support
- Fellowships
- Grants to individuals
- Research

APPLICATIONS

Applications may be submitted once a year before February 14th. The assessment of applications takes place in two stages. First, a brief project outline is submitted. Second, on the basis of the academic quality and particular focus of the proposals received, a number of applicants are invited to submit full applications.

Applications from abroad must demonstrate the existence of a clearly defined cooperation with Swedish scholars or research institutes.

RESTRICTIONS

Grants are rarely awarded for the purchase of equipment or, generally, where funding requirements can be met through state research councils and other authorities.

Applications sent by fax or e-mail will not be accepted.

LANGUAGES ACCEPTED

Swedish and English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Independent foundation

GOVERNANCE

Board of Trustees

Prof Eva Österberg, Chair
Sonia Karlsson, Vice-Chair
Associate Prof Christina Garsten
Per Bill
Johan Bygge
Berndt Ekholm
Prof Christer Jönsson
Lars-Erik Klangby
Lennart Kollmats
Prof Mats Larsson
Lars Lilja
Majléne Westerlund Panke

STAFF

Secretariat

Dan Brändström, Managing Director
Björn Olsson, Finance Director
Mats Rolén, Research Director
Christina Alm
Kjell Blücker
Margareta Bulér
Daniel Wändin
Håkan Lundmark
Patrik Hellgren
Elisabeth Hong
Annsofi Lövgren
Fredrik Lundmark
Kerstin Stigmark
Anna-Lena Winberg
14 full-time staff

PUBLICATION TYPES

Annual report
Application guidelines
Conference report/proceedings
Electronic/online information
Information brochures

FINANCIAL INFORMATION

2003	SWEDISH KRONA	EURO
Total Assets	7,314,435,000	811,290,734
Total Exp.	302,748,292	33,579,748
Grants Exp.	279,779,000	31,032,077

Number of grants: 465

SOURCES OF FUNDS

Originally set up by endowment, the foundation now receives income from investment in bonds, real estate and shares.

AFFILIATIONS

Network of European Foundations for Innovative Cooperation (NEF)
EFC Funding Member

ADDITIONAL ADDRESSES

Postal Address

P.O. Box 5675
114 86 Stockholm
Sweden

(Sources of information: Annual Report 2003; Website; Verified by funder)

TESCO PLC

FUNDING SINCE 1924

PRIMARY ADDRESS

New Tesco House
Delamare Road
Cheshunt
Hertfordshire, EN8 9SL
United Kingdom
Tel.: +44.199.263.2222
Web: www.tesco.com

KEY CONTACT

David Reid, Chair

MISSION

To create value for customers to earn their lifetime loyalty.

BACKGROUND

Tesco operates stores in thirteen countries - the UK, Republic of Ireland, Poland, Hungary, the Czech Republic, Slovakia, Turkey, Thailand, South Korea, Malaysia, China, Taiwan, and Japan. The core purpose of the company is to create value for customers and earn their lifetime loyalty. Corporate responsibility has an important role to play in achieving this.

GEOGRAPHIC FOCUS

UK, Thailand

PROGRAMME AREAS

Tesco runs a Charities and Fundraising programme which comprises of the following:

- Charitable giving in Thailand
- Tesco Charity Trust
- Tesco charity of the year
- Local sponsorship and collections
- Tesco staff fundraising
- Race For Life

Charitable Giving in Thailand

In Thailand, the company has set up the Tesco for Thais Foundation, a non-profit charitable foundation, which provides support to carefully selected projects in the

areas of education and health. Since February 2003, the foundation has contributed nearly 6 million baht to projects including scholarships at primary schools and universities, and the launch of the Tesco for Thais Blood Donation Campaign at all stores in Bangkok and upcountry.

Tesco Charity Trust

Established in 1987, the trust supports both national and local community charity appeals. Most local appeals are handled through the Tesco Charity Trust Community Award Scheme, which distributes some £360,000 each year to charities in communities where Tesco has stores. Community Awards benefit charities that deliver practical benefits to children's welfare, children's education, the welfare of elderly people and people with disabilities.

Tesco Charity of the Year

Each year, Tesco selects a national charity with a strong community network to become its Charity of the Year. This becomes the main focus for staff fund raising and receives a 20% 'top up' from the Tesco Charity Trust. Age Concern has been chosen as Tesco Charity of the Year 2005. The Charity of the Year framework for giving has also been adopted in Poland, Ireland, Hungary, and Slovak Republic. Often these are ground-breaking projects and have won many awards.

Local Sponsorship and Collections

- Charity Collections at Stores: Tesco endorses one two-day collection each month and aims to ensure that there is a balance between helping local communities and national charities
- Local Community Sponsorship: underlines the company belief that *Every Little Helps* by supporting projects and initiatives at store level which give practical benefits to children, education, people with disabilities and the elderly

Tesco Staff Fundraising

Tesco encourages staff fundraising for charity by adding a 20% top up from the Tesco Charity Trust to all the money they raise. This applies to the Tesco Charity of the Year as well as other local charities. In addition, through Tesco Give as you Earn staff can give to charities they care about directly from their pay.

Race For Life

Supports Cancer Research UK's Race for Life, a women only event where participants raise money for research into the prevention, treatment and cure for cancers. Also sponsors Cancer Research 10k events. These are held at stately homes around the UK and are open to both men and women.

AGEING ACTIVITIES

Tesco has teamed up with Age Concern - a federation of about 400 UK independent charities working together with and for older people, locally, regionally and nationally - to raise £2 million to combat isolation and poverty for older people. This will support Age Concern services such as befriending schemes, rural outreach, winter warmth and information and advice which are lifelines to many older people.

Over 500 Age Concerns have teamed up with almost 2,000 Tesco stores across the UK to raise money for older people. Tesco employees will be raising funds at events throughout the year.

TYPES OF SUPPORT

Awards/prizes
Continuing support
Corporate sponsorship
Employee matching gifts
Employee volunteering/technical assistance

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Direct corporate citizenship programme

TYPE OF BUSINESS

Retail trade

GOVERNANCE

Board of Directors

David Reid, Chair

Charles Allen

Richard Brasher

Rodney Chase

Philip Clarke

E Mervyn Davies

Dr Harald Einsmann

Andrew Higginson

Ken Hydon

Sir Terry Leahy

Tim Mason

Veronique Morali

Lucy Neville-Rolfe

Graham Pimlott

David Potts

PUBLICATION TYPES

Annual report
 Corporate contributions report
 Electronic/online information
 Financial statement
 Press release

FINANCIAL INFORMATION

2004	POUND STERLING	EURO
Annual Turnover	31,050,000,000	
	43,886,925,795	
Annual Profit	1,600,000,000	
	2,261,484,099	

ADDITIONAL ADDRESSES

Tesco Charity Trust
 Tesco Stores Ltd
 Delamare Road
 Cheshunt, EN8 9SL
 United Kingdom

Community Sponsorship
 Corporate Responsibility Department
 Tesco Stores Ltd
 Delamare Road
 Cheshunt, EN8 9SL
 United Kingdom

*(Sources of information: Website; Summary
 Financial Statement and Operating and
 Financial Review 2004)*

TUDOR TRUST

YEAR OF 1955

ESTABLISHMENT**PRIMARY ADDRESS**

7 Ladbroke Grove
 London, W11 3BD
 United Kingdom
 Tel.: +44.20.77.27.8522
 Fax: +44.20.72.21.8522
 Web: www.tudortrust.org.uk

KEY CONTACT

Nicky Lappin, Information and
 Communications Officer

MISSION

To help break cycles of disadvantage and
 dependency.

BACKGROUND

On 1 March 1955, Sir Godfrey Mitchell
 endowed a charitable trust with a gift of
 shares in the building company George
 Wimpey. In 1979 this trust became known as
 the Tudor Trust. The proceeds of the sale of

those shares have now been widely invested
 and shareholdings are selected according to
 socially responsible guidelines. The trustees
 of the Tudor Trust decide how its income and
 capital should be used to meet Tudor's
 charitable purposes.

GEOGRAPHIC FOCUS

UK and sub-Saharan Africa

PROGRAMME AREAS

The trust supports groups with charitable
 objectives who are involved in work
 addressing the following issues:

- Youth
- Older people
- Community
- Relationships
- Housing
- Health
- Learning
- Financial security
- Criminal justice

Youth

Provides support to detached youth work;
 centres and meeting places with a strong
 involvement of young people; peer education
 and peer mentoring; disaffected young men;
 and youth organisations which offer
 counselling for young people.

Older People

Supports projects involving intergenerational
 work; living with dementia; new ways of
 caring for people with dementia; and services
 for ethnic minority communities.

Community

Provides support to people living in
 disadvantaged and marginalised areas, and
 people experiencing social exclusion through
 community resources and centres set up and
 run by local people; and community managed
 green spaces in urban areas.

Relationships

Seeks to improve relationships in
 communities, schools and families through
 work with young parents, especially fathers;
 contact centres; work with perpetrators of
 domestic violence; and domestic violence
 outreach services.

Housing

Supports projects working to prevent and
 provide routes out of homelessness through
 family reconciliation; user participation/user

led work; resettlement; and affordable housing projects in remote areas.

Health

Focuses on two health issues:

- Mental health: supports projects that promote children's emotional well-being; self help/user led work; crisis services; services for ethnic minorities and social firms
- Substance abuse: supports peer education schemes; services for ethnic minorities; self help; residential centres for parents with young children; and complementary therapies

Learning

Grants support to new learning opportunities for young people needing additional assistance in their learning and young people who are missing out on education. Projects involve the provision of home/school/community links and alternatives for those not attending school.

Financial Security

Helps people who are excluded from mainstream financial services or who are only just managing. Projects focus on financial literacy; integrated money advice and budgeting schemes; community credit schemes; and community finance.

Criminal Justice

Supports projects that seek to reduce incidences of criminal offence and promote rehabilitation among young and at risk individuals; offenders at pre/post release stage; families/friends of offenders; and mentally/personality disordered offenders. Projects focus on alternatives to custody; accommodation; strengthening family relationships/visiting; therapeutic regimes/interventions; and routes to employment.

AGEING ACTIVITIES

2003 Representative Grants

- Abbeyfield Epping Society Ltd: £150,000 towards the capital costs of building in extension to Cunningham House to provide specialist dementia care
- Abbeyfield Paisley Society £75,000 towards the capital costs of a nine-bed dementia unit for older people at a new care home and day centre in Paisley

- Abbeyfield Society £40,000 over two years towards the staffing costs of volunteer development programmes to work throughout the Abbeyfield movement on recruitment and training of new volunteers
- Age Concern Barnsley £44,000 over two years towards the running costs of the new Building Bridges intergenerational project to recruit and train older people as volunteers or mentors helping children and young people to exchange skills, life experiences and knowledge
- Age Concern Cambridgeshire £10,000 over two years for a befriending scheme for older people
- Age Concern Malvern & District £40,000 over two years towards the costs of the On The Move project providing a mobile day centre and information service in seven villages in the Malvern
- St David's Cottage Day Centre £15,600 over one year for a development worker for an older people's day centre in Midlothian
- St Mary's Convent and Nursing Home £100,000 for the upgrading of residential and nursing facilities in Chiswick, London, for elderly people
- Stockwell Good Neighbours £20,000 over two years for the salaries of a part-time worker for a club for older people in Lambeth, London
- Tawakal £10,000 over one year for a self-help project for elderly Somali women in Tower Hamlets
- Wapping Bangladesh Association £10,800 over two years towards the salary of an Older People's Support Worker to provide advice on diet, exercise and well-being to older people from the Bangladeshi community in East London
- Yemeni Elderly in Small Heath £10,000 over two years for volunteer training and expenses for work with Yemini & Sparkbrook elders in Birmingham befriending scheme for older people with dementia or mental health problems living in their own homes or in care
- Age Concern Sir Gar £18,000 over two years towards the running costs of the handyperson and befriending schemes for

elderly people living in rural areas of Carmarthenshire

- Age Concern Somerset £10,000 over one year for an advice service for older people living in rural areas in Somerset
- Age Concern Torbay £30,000 over two years for the salary of the co-ordinator for the Integrated Home Services scheme for vulnerable older people in Torbay
- Agewell and Lunch Clubs £34,000 over two years for the running costs of a new befriending project for older in Sheffield Ltd people using people from the local community and members of the organisation's lunch clubs or Agewell groups as trained befrienders

TYPES OF SUPPORT

Building/renovation
Core costs
Equipment
Project costs

APPLICATIONS

Applicants are requested to read the full application procedure, available on the Tudor Trust website, or in the published Funding Guidelines. Applicants should note that in 2005-2006 the trust is only accepting applications from organisations it has funded in the previous five years. See the website for full details.

Initial approach by letter.

RESTRICTIONS

Unless specifically mentioned in its current priorities, the trust is unable to consider for funding:

- Individuals - including students
- Statutory authorities
- Larger national charities enjoying widespread support
- Organisations whose main purpose is working with: people with a physical/learning disability, physical illness, sensory impairment or Autistic Spectrum Disorder
- The core work of advice and information giving organisations including CABx; community foundations; councils for voluntary service; infrastructure organisations; volunteer bureaux or centres
- Community projects focusing on transport; playgrounds/play equipment; promotion of volunteering; summer

schemes; under 5's provision and children's centres; village and church halls

- Criminal justice projects focusing on crime prevention or the victims of crime and abuse
- Health projects focusing on carers, counselling; hospitals and hospices; medical care; medical research
- Learning projects focusing on adult learning; after school and homework clubs; breakfast clubs; bursaries and scholarships; employment training; mainstream schools and colleges; IT training centres; mother tongue classes/cultural activities; research; universities
- Relationship projects focusing on adoption services, bereavement or counselling

In addition, the trust does not fund arts; conferences, events, publications; conservation of buildings, flora & fauna, animal charities; endowment appeals; promotion of religion; museums/places of entertainment/leisure clubs, sport, holidays/holiday centres, expeditions, travel; scouts, guides and other uniformed youth groups.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered Charity Number 1105580.
Company limited by guarantee Number 5196041

GOVERNANCE

Board of Trustees

Ray Anstice

Catherine Antcliff

Monica Barlow

Nell Buckler

Louise Collins

Elizabeth Crawshaw

Ben Dunwell

Helen Dunwell

Matt Dunwell

Christopher Graves

Desmond Graves

Mary Graves

James Long

Francis Runacres

STAFF

Christopher Graves, Director
 Roger Northcott, Assistant Director and
 Company Secretary
 Philippa Dove, Grants Team Coordinator
 Linda Eaton, Receptionist
 Eryl Foulkes, Grants Officer
 Claire Kimbell, Personal Assistant to the
 Assistant Director
 Anne Lane, Grants Officer
 Nicky Lappin, Information and
 Communications Officer
 Tehseen Overy, Head of Finance
 Catriona Slorach, Grants Officer
 Ruth Smith, Personal Assistant to the
 Director
 Beverley White, Office Manager
 Eman Yosry, Services Manager
 Helen Baron, Administrative Assistant
 Laura Bowman, Grants Officer
 13 full-time staff
 2 part-time staff

PUBLICATION TYPES

Annual report (includes grants list)
 Application guidelines

FINANCIAL INFORMATION

2004	POUND STERLING	EURO
Total Assets	253,158,000	357,820,495
Total Exp.	21,485,000	30,367,491
Grants Exp.	20,587,000	29,098,233
Programme Exp.	898,000	1,269,258
Number of grants:	776	

SOURCES OF FUNDS

Income derived from expendable
 endowment.

NOTES ON FINANCIAL INFORMATION

Figure for Social Investment Expenditure is
 an approximation. Not all Financial Security
 loans can be classed as social investment.

AFFILIATIONS

Association of Charitable Foundations (ACF)

*(Sources of information: Website; Annual
 Report 2004; Verified by funder)*

THE WORSHIPFUL COMPANY OF INFORMATION TECHNOLOGISTS' CHARITABLE TRUST
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YEAR OF not available

ESTABLISHMENT**PRIMARY ADDRESS**

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 London, EC1A 7JN
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 Tel.: +44.20.7600.1992
 Fax: +44.20.7600.1991
 E-mail: trust@wcit.org.uk
 Web: www.wcit.org.uk

MISSION

To bring the benefits of information
 technology (IT) within reach of people
 disadvantaged for whatever reason.

BACKGROUND

The Worshipful Company of Information
 Technologists (WCIT) has its origins in the
 early 1980s when two IT professionals, Alan
 Benjamin and Bernard Harty, approached the
 City of London to discuss the possibility of a
 Livery Company based on the Information
 Technology profession. Many people were
 interested in promoting professional
 standards; supporting education and training;
 and undertaking charitable activities and
 wanted to give something back to the
 Information and Communication
 Technologies (ICT) industry. Six years after
 it was founded, WCIT was awarded full
 Livery Company status and received a
 charter from the Lord Mayor and Aldermen
 of the City of London. The company's
 charitable work is coordinated by the WCIT
 Charitable Trust.

GEOGRAPHIC FOCUS

UK

RELATED ORGANISATIONS

The Worshipful Company of Information
 Technologists

PROGRAMME AREAS

WCIT is composed of panels with groups of
 Freemen and Liverymen who concentrate on
 an area of interest. The 12 panels include:
 Arts Panel; Charity Dinner Panel; Charity
 Walk Panel; Disability Panel; Education and
 Training Panel; Ethical and Spiritual
 Development Panel; Events Panel; Housing
 Panel; Industry Panel; Medicine and Health

Panel; Recreation and Leisure Panel; and Youth and Community Panel. The trust operates a variety of educational/training programmes including:

- Open age
- King George's Hostel
- Leading the way to ICT success
- Voluntary Service Overseas (VSO)
- St. Botolph's project
- Young Carers Project

Open Age

Teaches basic IT skills to more than 100 older people at a west London community centre. The project built a new IT room at the Open Age Centre in North Kensington. Introduction to IT courses are being run for older people with no previous experience of computing, and once the course has been completed, trainees are then able to use the centre on a drop-in basis.

King George's Hostel

Raises money to fund the installation of IT systems for staff and residents at the King George's Hostel in Westminster for homeless men, using IT as a way of building confidence and skills for the hostel's residents. Residents can also take a short introductory course using the computers. Topics include using Microsoft Word; editing photos and pictures through Photoshop; and an introduction to the Internet.

Leading the Way to ICT Success

The WCIT and the Baring Foundation have jointly funded the report 'Leading the Way to ICT Success'. The report is based on interviews with a range of charities who are successfully using ICT, drawing out the key lessons from their experiences to provide a framework to maximise the voluntary sector's effective use of ICT.

Voluntary Service Overseas (VSO)

Develops a knowledge sharing website for VSO volunteers on IT placements across the developing world to promote the exchange of ideas and best practice models.

St. Botolph's Project

Works with St. Botolph's Project, a homelessness charity, to provide an IT-based information system for use by clients attending the Aldgate Advice Centre.

Young Carers Project

Provides access to IT for the children and young people attending NCH's Young Carers Projects. This will enable these children to develop IT skills and to link with other young carers groups across the country. A second part of this project is to provide a knowledge management system for staff in the young carers projects, enabling them to share ideas and develop best practice models.

TYPES OF SUPPORT

Capital support
Educational/training programmes
Employee volunteering/technical assistance
Equipment
Funder-operated programmes
Information systems
Programme development
Research
Staff development

APPLICATIONS

Although many of the company's charitable activities are developed proactively from within the company, the trust considers proposals from registered charities, libraries, educational establishments, churches, hospitals or similar non-profit organisations. Organisations interested in developing projects with WCIT should contact the trust for an initial discussion. The purpose of this discussion will be to clarify whether the proposed project meets the company's criteria; to assess the capacity of the company to take on new projects; and to determine whether additional information is required at this stage. Appropriate project proposals will be taken to the company's panels for a decision. This decision is normally confirmed within three months of the initial approach to the company. Applicants must meet the following criteria: projects must directly benefit an identifiable group, especially those who are disadvantaged for whatever reason; projects must demonstrate an innovative use of IT, which can be developed into a model for wider replication; projects must be sustainable beyond the time frame of the company's involvement; and projects must focus on outcomes which can be formally evaluated.

RESTRICTIONS

Funding is only offered to projects where the company's membership has been actively involved in the development of the project.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Corporate foundation

HONORARY/ADVISORY COMMITTEE

The company's charitable programme is delivered through a number of panels - groups of freemen and liverymen who share an interest in a particular issue, and who give their time and skills, working together to deliver a range of projects and other company activities. There is no fixed number of panels. Over time new panels are formed and existing panels become dormant as their project/activity is completed. There are currently 12 active panels.

PUBLICATION TYPES

Electronic/online information

(Sources of information: Website)

BLAGOTVORITELNY FOND RAZVITIYA GORODA TYUMENI
--

YEAR OF 1999

ESTABLISHMENT**PRIMARY ADDRESS**

Geologorazvedchikov 2-503
625026 Tyumen
Russia
Tel.: +7.3452.49.4275
Fax: +7.3452.22.3331
E-mail: info@cftyumen.ru
Web: www.cftyumen.ru

KEY CONTACT

Vera Barova, Executive Director

NAME IN ENGLISH

Community Foundation Tyumen

MISSION

To enhance the lives of those who live in Tyumen by providing grant support to social initiatives of citizens and non-profit organisations.

BACKGROUND

The Community Foundation Tyumen (CFT) was established when sociological research conducted in 1998 showed a great interest in charity among Tyumen businessmen and

firms. The foundation was set up to provide philanthropic vehicles to make giving easy and effective in areas of the city with social problems; rehabilitation of disabled people, organisation of their workplaces and leisure; organisation of leisure activities for young adults, children and teenagers; and preservation of historical legacy of Tyumen.

GEOGRAPHIC FOCUS

Tyumen

RELATED ORGANISATIONS

Interregional Public Foundation - Siberian Civic Initiatives Support Center

PROGRAMME AREAS

Supports mainly the following groups:

- Citizen groups that solve important social problems
- Organisations for disabled and aged people
- Groups supporting children and teenagers
- Non-profit organisations working in the social sphere

TYPES OF SUPPORT

Conferences/seminars
Educational/training programmes
Employee volunteering/technical assistance
General support/general purposes
Programme development
Publications

APPLICATIONS

Applications are invited while grant competitions are held.

RESTRICTIONS

Does not work with religious or political organisations nor with trade unions.

LANGUAGES ACCEPTED

Russian

TYPE OF FUNDER

Community foundation

GOVERNANCE

V.I. Borisov
V.Y. Chuev
V.S. Krivodanov
T.S. Loskutnikova
S.G. Pandyreva

HONORARY/ADVISORY COMMITTEE

N.Y. Bragina
S.N. Gorobey
S.M. Kirichuk
S.A. Kiverin
V.E. Kopylov
V.V. Kropchev

BOOTS CHARITABLE TRUST

S.M. Medvedev
I.F. Nekrasov
G.I. Raikov
V.I. Ryabkov
E.Y. Semenova
V.S. Shevtchik

STAFF

Vera Barova, Executive Director
Larisa Zubtsova, Financial Director
Svetlana Dremlyuga, Grant Programme
Manager
Elena Obriadina, Fund-raising Programme
Manager
8 full-time staff
1 part-time staff
2 volunteers

PUBLICATION TYPES

Electronic/online information
Financial statement
Grants list
Information brochures
Newsletters/periodicals
Press releases

FINANCIAL INFORMATION

2003	ROUBLE	EURO
Total Assets	4,665,622	123,997
Total Gifts	1,305,132	34,686
Total Exp.	3,990,426	106,053
Grants Exp.	1,159,966	30,828
European-level Exp.	3,990,426	106,053
Programme Exp.	2,830,460	75,225
Number of grants:	25	

SOURCES OF FUNDS

Gifts, donations, grants from foreign foundations.

AFFILIATIONS

EFC Guest

(Sources of information: EFC membership application form; Verified by funder)

YEAR OF 1970

ESTABLISHMENT

PRIMARY ADDRESS

The Boots Company
Charitable Investment
1 Thane Road West
Nottingham, NG2 3AA
United Kingdom
Tel.: +44.115.949.2185
Fax: +44.115.949.2120
E-mail: gary.beharrell@boots-plc.com
Web: www.boots-
plc.com/communityinvestment

KEY CONTACT

Gary Beharrell, Systems and Trust
Development Manager

MISSION

To enhance the lives of people in and around Nottingham, UK.

BACKGROUND

Boots was founded at the turn of the 20th century in Nottingham and still has its headquarters there. The company established the Boots Charitable Trust in 1970.

GEOGRAPHIC FOCUS

UK, particularly the Nottinghamshire region

RELATED ORGANISATIONS

Boots Company plc

PROGRAMME AREAS

The trust's funding priorities include:

- Health care
- Lifelong learning
- Community development
- Social care

Health Care

Supports appeals from organisations working with, and on behalf of, the blind, deaf, and physically disabled; and those involved in the fields of mental health, epilepsy, long-stay and terminal care, nurses and nursing, alcoholism, drug addiction and care of the elderly. Appeals from hospitals other than private hospitals are also considered. This is divided into two areas. The first is Community health care, which includes community health care services; home care; after care; sufferers of medical conditions and disabled people; and continuing care. The second area is health education and prevention, promoting knowledge and

awareness of specific diseases or medical conditions.

Lifelong Learning

Helps people of any age to achieve their educational potential through supplementary schools, literacy and numeracy projects, community education, vocational/restart education for the unemployed, and alternative education for excluded school pupils.

Community Development

Helps groups to organise and respond to problems and needs in their communities or networks. This includes groups such as Councils for Voluntary Services and self-help groups.

Social Care

This aspect is divided into three areas. The first is personal social services, supporting organisations assisting individuals or families to overcome social deprivation, including people who are homeless or disabled and their carers; lone parent and child care groups; and other family support groups. The second is social preventative schemes, supporting activities preventing crime, dropping out and general delinquency; and providing other social care outreach work, social health and safety awareness schemes. The third area is community social activities, supporting activities that promote social engagement for vulnerable people, mitigating the effects of isolation and loneliness.

TYPES OF SUPPORT

Capital support
Curriculum development
Educational/training programmes
Matching support

APPLICATIONS

The company budget is used to support initiatives where Boots has a special interest, and projects are therefore sought on a proactive basis. The company does not, therefore, respond to appeals other than through the Boots Charitable Trust. All applicants must complete an application form and send it, along with an annual report, accounts and any supporting documentation such as letters of support, by post to the trust. The application form is available on the website or by post upon request in writing. There are no deadlines for applications. Trustees meet regularly during the year, but a

grant will take anything from four weeks (grants of less than £1,000) to six months (grants of more than £1,000). All applications will be acknowledged. Initial approach by letter.

RESTRICTIONS

Priority is given to charities benefiting Nottingham, Nottinghamshire and Erewash. Appeals may be considered from organisations located in other areas within the UK where the Boots Company has a significant representation and when the appeal is supported by a strong recommendation from that Boots business unit. Appeals from individuals, private fundraising groups and organisations that are not registered with the Charity Commission and appeals from outside the UK are ineligible for consideration. Projects are excluded for which there is a clear statutory obligation. The trust is especially interested in approaches with the capacity to influence a wide audience within the trust's area of support.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Corporate foundation

LEGAL STATUS

Independent registered charity

GOVERNANCE

Committee of Trustees

A.L. Bowe

J.A. Cohen

A.P. Smith

J.J.H. Watson

K.R. Whitesides

STAFF

Gary Beharrell, Systems and Trust

Development Manager

S. Fennell, Secretary

PUBLICATION TYPES

Annual report

Application guidelines

Electronic/online information

FINANCIAL INFORMATION

2002	POUND STERLING	EURO
Total Assets	10,241	14,475
Total Gifts	258,719	365,681
Total Exp.	255,654	361,348
Grants Exp.	172,640	244,014
Number of grants:	80	

SOURCES OF FUNDS

Funded by the Boots Company plc and from donations by staff of the company.

NOTES ON FINANCIAL INFORMATION

Financial year ended March 31st 2002.

(Sources of information: Statement of Policy on Charitable Giving; Trustees' Report and Financial Statements 31st March 2001; Website; Verified by funder)

<p style="text-align: center;">CO-OPERATING NETHERLANDS FOUNDATIONS FOR CENTRAL AND EASTERN EUROPE</p>

YEAR OF 1990

ESTABLISHMENT

PRIMARY ADDRESS

P.O. Box 156
1200 AD Hilversum
Netherlands
Tel.: +31.35.624.9651
Fax: +31.35.624.6132
E-mail: info@cnfcee.nl
Web: www.cnfcee.nl

KEY CONTACT

Thomas A.M.A. van der Ven, General
Coordinator

MISSION

To promote a pluralist civil society through giving specific financial and consultancy support to projects in the fields of social welfare, health care and education, especially by encouraging private initiative.

BACKGROUND

The Co-operating Netherlands Foundations for Central and Eastern Europe (CEE) was founded at the end of 1990 when a number of Netherlands foundations decided to join forces in providing support to CEE to prevent the dissipation of know-how and financial resources. At present the cooperation consists of the following foundations: Foundation for Children's Welfare Stamps, Het R.C. Maagdenhuis Foundation, Skan Foundation,

and Oranje Fonds. Additionally there are approximately 30 foundations which participate on an occasional basis. There is also cooperation with the Dutch Ministry of Foreign Affairs. The cooperation aims to coordinate the activities of the participating foundations and collectively develop and exploit the existing expertise within them.

GEOGRAPHIC FOCUS

Bulgaria, Estonia, Latvia, Lithuania, Romania, Croatia, Western Ukraine and the Slovak Republic

PROGRAMME AREAS

Projects receiving support cover the range of social welfare, public health and education spheres. They can be divided into the following categories:

- Addiction
- Community work
- People with a disability
- Education
- The elderly
- The homeless
- Minorities
- Public health
- Disadvantaged youth

The cooperation occasionally focuses on additional areas, such as unemployment and regional development.

TYPES OF SUPPORT

Building/renovation
Educational/training programmes
Equipment
General support/general purposes
Staff development

APPLICATIONS

When applying, please note that objectives must be clear; application must be complete; project must be feasible and justifiable; organisational structures must be strong enough; co-financing must be indicated; project must have a solid social support; and voluntary work must be promoted.

RESTRICTIONS

Only registered NGOs may apply and investments are one-time only. The project must operate as a model that can be repeated by other organisations. At the same time, it has to be innovative in the sense that it shows a workable example to the community. The project must be an exponent of de-institutionalisation and utilise proper working

methods. The applying organisation has to make a contribution itself, either from its own financial resources or through the mobilisation of volunteers or (local) sponsors in kind. The project must have an open structure, without restrictions to those in need based on religion, ethnic descent, political conviction etc. Applying organisations must be independent from any political stream or party that could influence the independence and sustainability of the project. For church projects this means that initiatives of an ecumenical nature are preferred; projects that are set up from a specific religious orientation need to be open in their attitude to others in order to qualify for support. All book-keeping must be transparent.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered charity and company invited by guarantee

GOVERNANCE

A. G. van der Stoel, President
N. Bakkesen-Voogd, Vice-President

STAFF

Thomas A.M.A. van der Ven, General Coordinator

PUBLICATION TYPES

Annual report
Electronic/online information
Newsletters/periodicals

FINANCIAL INFORMATION

2001	EURO	EURO
Grants Exp.	5,782,117	5,782,117
Number of grants:	227	

ADDITIONAL ADDRESSES

Oranje Fonds
P.O. Box 90
3980 CB Bunnik
Netherlands
Tel.: +31.30.656.4524
Fax: +31.30.656.2204
E-mail: info@oranjefonds.nl

Foundation for Children's Welfare Stamps
Schipholweg 73/75
2316 ZL Leiden
Netherlands
Tel.: +31.71.525.9800
Fax: +31.71.513.0147
E-mail: mteeffelen@skn.nl

Het R.C. Maagdenhuis Foundation
Herengracht 220
1016 BT Amsterdam
Netherlands
Tel.: +31.20.624.3903
Fax: +31.20.638.2814
E-mail: rcm@xs4all.nl

SKaN Foundation
P.O. Box 156
1200 AD Hilversum
Netherlands
Tel.: +31.35.624.9651
Fax: +31.35.624.6132
E-mail: info@cnfcee.nl

(Sources of information: Annual Report 2000; Website; Verified by funder)

<p>COMMUNITY FOUNDATION FOR WILTSHIRE AND SWINDON</p>
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YEAR OF 1991

ESTABLISHMENT

PRIMARY ADDRESS

48 New Park Street
Devizes, SN10 1DS
United Kingdom
Tel.: +44.138.072.9284
Fax: +44.138.072.9772
E-mail: info@wscf.org.uk
Web: www.wscf.org.uk

KEY CONTACT

Ruth Jones, Director

MISSION

To help direct funds where they are most needed and where they can make the most difference in the Wiltshire and Swindon county.

BACKGROUND

The Wiltshire and Swindon Community Foundation was established to provide a permanent source of grant aid for local charities.

GEOGRAPHIC FOCUS

Wiltshire and Swindon, UK

FORMER NAME

Wiltshire Community Foundation

PROGRAMME AREAS

The foundation runs the following funds:

- Main Project Fund
- Small Grants Fund
- Progress Fund
- Local Network Fund
- Sports Relief Fund

Main Project Fund

Supports community care projects in the following areas: supporting carers, the disabled and the elderly; tackling isolation; dealing with rural transport and services and working with people who are isolated because of illnesses or for cultural reasons; and investing in young people aged 12 to 25, especially those young people who have worries about accommodation, addiction or behavioural problems.

Small Grants Fund

Funds groups with an income of less than £10,000 per year with one time grants of £50-£500.

Progress Fund

Aims to help people of working age improve their skills, build confidence, raise self-esteem and improve access to work. Especially helps groups working with marginalised communities. This fund is supported by the European Social Fund (ESF).

Local Network Fund

Provides grant aid up to £7,000 per project to finance activities designed to increase the opportunities available to disadvantaged children or young people.

Sports Relief Fund

Funds work that uses sport and exercise to strengthen communities and provide opportunities for people who are excluded or disadvantaged. Grants range from £250 to £5,000.

APPLICATIONS

Initial approach by telephone, after which successful applicants will be sent a form to complete.

RESTRICTIONS

Does not give grants outside Wiltshire and Swindon. Does not fund individuals;

sponsored events; general large appeals; advancement of religion; medical research and equipment; animal welfare; political party activities; and substitution of statutory sector funds.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Community foundation

LEGAL STATUS

Registered charity

GOVERNANCE

The 12 trustees include people from the business sector, private individuals and professional advisors.

HONORARY/ADVISORY COMMITTEE

Honorary solicitors and honorary treasurer.

STAFF

Ruth Jones, Director
 Jen Wildblood, Programme Director
 Kate Hunter, Development Director
 Marie Hale, Grants Officer
 Jill Dyke, Grants Administrator
 John Nash, Finance Officer
 Jennie Francis, Office Manager.
 7 full-time staff
 40 volunteers

PUBLICATION TYPES

Annual report
 Application guidelines
 Electronic/online information
 Newsletter: 'Wiltshire Matters'

FINANCIAL INFORMATION

2004	POUND STERLING	EURO
Total Assets	2,673,997	3,779,501
Total Gifts	795,285	1,124,078
Total Exp.	779,221	1,101,372
Grants Exp.	510,584	721,673
Programme Exp.	268,637	379,699
Number of grants:	193	

SOURCES OF FUNDS

Corporates, ESF, trusts, individuals and statutory.

NOTES ON FINANCIAL INFORMATION

Figures are from the 2003/2004 financial year.

AFFILIATIONS

Association of Charitable Foundations
 Community Foundation Network

(Sources of information: Website; Verified by funder)

COMPAGNIA DI SAN PAOLO

YEAR OF 1992

ESTABLISHMENT

PRIMARY ADDRESS

Corso Vittorio Emanuele II, 75

10128 Turin

Italy

Tel.: +39.011.559.6911

Fax: +39.011.543.607

E-mail: info@compagnia.torino.it

Web: www.compagnia.torino.it

KEY CONTACT

Dario Disegni, Head of Cultural Affairs and Institutional Relations

MISSION

To support works of public interest and social well-being, particularly in the fields of scientific, economic and legal research, education, art and culture, and health; and to provide assistance to, and protection of, less-privileged social groups.

BACKGROUND

The Compagnia di San Paolo was founded in Turin in 1563 as a charitable lay brotherhood by seven citizens who decided their mission was to help the poor. Throughout its long history, it has supported a range of charitable activities in the fields of health, education and social welfare. In 1992, it was transformed into a foundation as a consequence of the restructuring of the San Paolo Bank Group. After the privatisation of the San Paolo Bank, the Compagnia di San Paolo no longer holds the controlling shares in the bank.

GEOGRAPHIC FOCUS

Italy and international

PROGRAMME AREAS

The foundation focuses its funding activities on the following areas:

- Research
- Education
- Art
- Culture
- Health
- Welfare

Research

Supports basic scientific research and the dissemination of scientific knowledge as well as experimenting with new technologies, particularly in the biomedical field with

studies that foster new diagnostic and therapeutic applications. Also supports research on economics; social sciences; international relations; and the institutional activities of outstanding Italian and international centres working in the above fields.

Education

Promotes the fostering of excellence in university and post-university education; the development of autonomy in the school system; and the spread of a culture based on civic spirit and responsibility.

Art

Seeks to preserve and safeguard the artistic and cultural heritage by entering into restorative projects, in particular in Turin, Genoa and the south of Italy. Also supports exhibitions of European artwork, historical publications and documentation of various restoration and similar works on the region's artistic treasures.

Culture

Supports cultural events that promote European literary and historical research and that allow for European collaborative projects. Also supports initiatives in diverse cultural areas (music, theatre, cinema) and specific projects related to archives and libraries.

Health

Focuses on technical and scientific health care equipment grants and supports non-profit associations, research grants and the restructuring and modernisation of health service organisations.

Welfare

Provides assistance in the fight against poverty, hardship and marginalisation. Focuses on drug addiction, the disabled, serious illness, the elderly, the homeless and young people at risk.

TYPES OF SUPPORT

Building/renovation

Educational/training programmes

Equipment

Public awareness campaigns

Research

Scholarships

APPLICATIONS

Information and application forms are available upon request or on the website. A short explanation of the project is required. Initial approach by letter.

RESTRICTIONS

No support to profit-making organisations or political party and union organisations. No direct support to individuals.

LANGUAGES ACCEPTED

Italian and English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Independent grantmaking foundation under Italian civil law

GOVERNANCE*Governance*

Franzo Grande Stevens, Chair
Carlo Callieri, Vice-Chair
Caterina Bima, Vice-Chair
Lorenzo Caselli
Bruno Manghi
Riccardo Roscelli
Luigi Terzoli

HONORARY/ADVISORY COMMITTEE

Guiseppe Anfossi
Rinaldo Bertolino
Bartolomeo Bianchi
Vincenzino Caramelli
Matteo Giuliano Caroli
Elio Casetta
Franco Corsico
Francesco Dassano
Giuseppe Di Chio
Sergio Dosio
Aldo Fasolo
Amato Luigi Molinari
Attilio Oliva
Angelo Maria Petroni
Alberto Piazza
Giuseppe Pichetto
Patrizia Polliotto
Giovanni Ravasio
Chiara Saraceno
Massimo Segre
Lorenzo Trinello

STAFF

Piero Gastaldo, Secretary General
72 full-time staff

PUBLICATION TYPES

Annual report
Electronic/online information

Information brochures
Monographs
Newsletters/periodicals

FINANCIAL INFORMATION

2004	EURO	EURO
Total Assets	6,805,000,000	6,805,000,000
Total Exp.	131,600,000	131,600,000
Grants Exp.	119,000,000	119,000,000
European-level Exp.	765,500	765,500
Number of grants:	721	

SOURCES OF FUNDS

Income from investments.

AFFILIATIONS

Council on Foundations
Network of European Foundations for Innovative Cooperation (NEF)
EFC Funding Member

(Sources of information: Website; Verified by funder)

DAGMAR AND VÁCLAV HAVEL FOUNDATION VIZE 97

YEAR OF not available

ESTABLISHMENT**PRIMARY ADDRESS**

Voršilská 10
110 00 Praha 1 Prague
Czech Republic
Tel.: +420.23.409.7811
Fax: +420.23.409.7812
E-mail: nadace@vize.cz
Web: www.vize.cz

KEY CONTACT

Mgr Dagmar Havlová, Chair

MISSION

To respond to the needs of society.

BACKGROUND

The Dagmar and Václav Havel Foundation Vize 97 covers a broad range of interests, reflecting the concerns of its founders. The foundation operates chiefly in the fields of social care, medicine, education and culture. However, on occasion it organises or lends support to various activities in the field of human rights, while also seeking to respond to society's needs at a given moment. At the same time, the foundation also strives to support projects that are forward-looking, causes that might seem less important or even

marginal at the present but will prove their worth over the course of time. The foundation regularly gives minor financial donations to provide one-off assistance to organisations of every kind, as well as to individuals in dire need of help.

GEOGRAPHIC FOCUS

Czech Republic

PROGRAMME AREAS

The foundation's priority funding areas include:

- Health care
- Social projects
- Culture
- Education
- Emergency assistance

Health Care

Focuses on early diagnosis and prevention of colon and rectal cancer. Years of negotiations with health care authorities has ensured that everyone over the age of 50 in the Czech Republic can now be tested for free once every two years. In addition, the foundation runs a fundraising campaign for the purchase of equipment to treat these cancers. The foundation's chair, Dagmar Havlová, raises awareness of measures required to initiate these programmes at various international medical symposia and commissions. This aims to highlight the issue in countries where prevention of colorectal carcinomas is not a matter of course.

Social Projects

- The Fund of Understanding: serves as a kind of safety belt for aged people on their own, for the mentally or physically handicapped, for the gravely ill, for foster families and for destitute citizens. Assists cultural projects, such as exhibitions, concerts, and non-commercial books, journals and publications. Gives permanent patronage of the Home of the Holy Family at Liboce in Prague, which has become home to several dozen adult clients with various degrees of handicap. The foundation has also started to cooperate with the Charles Boromeo Home at Øepy, in Prague, which it supplied with wheelchairs and various other material gifts on the occasion of Children's Day
- Help to Children in Chechnya: helps Chechen children who have lost one or

both of their parents. Through the intermediary of Czech Catholic Charita, the foundation 'adopted' 6 children, and contributes towards their food, clothing and accommodation in children's centres

Culture

- Dagmar and Václav Havel Foundation VIZE 97 Prize: awarded annually to an individual whose work has made a major contribution towards broadening humanity's horizons, pinpointing lesser known implications of phenomena, integrating science into the general culture and promoting alternative human attitudes to fundamental questions
- The Prague crossroads: Work is in progress towards the creation and administration of an international spiritual centre to be known as the Prague Crossroads. It is intended to be an impressive venue for all kinds of meetings, where lectures, discussions, concerts, performances, exhibitions, meditation and happenings can take place in a spirit of respect for the multicultural diversity of the modern world

Education

The foundation's Education Programme makes grants to Czech university students for undergraduate or post-graduate study abroad. The programme has acquired enormous prestige among students and teachers, and convinced sponsors that it is a worthwhile investment.

Emergency Assistance

The foundation's Floods II Programme renders post-flood aid wherever it is needed. In 2003, some 6.5 million crowns were distributed to people whose homes were destroyed in the floods. Financial aid was also given to the Teresian Library, the National Theatre, the Pod Palmovkou Theatre, and the Roxy Theatre, as well as for the reconstruction of a chapel in Putim virtually demolished by the floods. The foundation supports fundraising events for flood-relief activities such as concerts and charity performances.

TYPES OF SUPPORT

Capital support
Equipment
Funder-operated programme
Student aid

APPLICATIONS

The range of non-profit organisations eligible are those which:

- Enable the seriously ill to live out their lives in dignity (hospices)
- Care for mentally and physically handicapped citizens
- Assist people with a health handicap to integrate into society (sheltered workshops)
- Offer assistance to those in difficult personal situations (refuges, halfway houses)
- Care for minors with no family environment
- Provide humanitarian assistance to victims of racist or religious persecution
- Provide humanitarian assistance to victims of natural disasters
- Assist in the publication of books or magazines; or organise exhibitions, theatrical shows etc to promote mutual respect and understanding among social groups

Grant applications should include:

- The organisation's registration, a copy of its deed of association etc
- A written application including precise details of the project
- A detailed cost assessment
- Funding sources
- An independent assessment of the submitted project
- End-of-year accounts for the previous year

Initial approach by letter.

LANGUAGES ACCEPTED

Czech and English

TYPE OF FUNDER

Independent foundation

GOVERNANCE

Board of Trustees

Dagmar Havlová

Václav Havel

Tomás Bouzek

Tána Fischerová

Eliska Fucíková

Vladimír Kreidl

Karel Schwarzenberg

Franziska Sternbergová

Jirina Siklová

Jirí Solc

Petr Weigl

HONORARY/ADVISORY COMMITTEE

Supervisory Board

Ing Pavel Kavánek, Chair

JUDr Jan Matejcek

Ing Michael Petrman

PUBLICATION TYPES

Annual report

Electronic/online information

Financial statement

FINANCIAL INFORMATION

2003	CZECH CROWN	EURO
Total Assets	155,347,000	5,094,413
Total Gifts	15,274,000	500,892
Total Exp.	11,181,000	366,667
Programme Exp.	6,254,000	205,092

SOURCES OF FUNDS

Foundation sponsors 2004

ha-vel

ASTRA SECURITY a.s.

Welldan s.r.o.

Pražská plynárenská a.s.

Wafenhofer spol.s.r.o.

Ryor a.s.

TelSource Services B.V.

Lions Club Praha Orel

Welldan Capital a.s.

Prague CZ Fashion s.r.o.

NOTES ON FINANCIAL INFORMATION

For the year ending 31.12.2003

(Sources of information: Website)

DERBYSHIRE COMMUNITY FOUNDATION

YEAR OF ESTABLISHMENT 1996

PRIMARY ADDRESS

The Old Nursery, University of Derby

Chevin Avenue, Mickleover

Derby, DE3 5GX

United Kingdom

Tel.: +44.133.259.2050

Fax: +44.133.259.2200

E-mail:

info@derbyshirecommunityfoundation.co.uk

Web: www.derbyshirecommunityfoundation.co.uk

KEY CONTACT

Hilary Gilbert, Director

MISSION

To support the citizens of Derbyshire county and the city of Derby.

BACKGROUND

The Derbyshire Community Foundation was established to help the disadvantaged and enhance community life.

GEOGRAPHIC FOCUS

Derbyshire, UK

PROGRAMME AREAS

Funds available from the foundation are:

- Bridging the Gap in Derbyshire
- Community Champions
- Neighbourhood Renewal Unit
- The Local Network Fund
- Community Empowerment Fund

Bridging the Gap in Derbyshire

This is a fast track small grants programme funded by The Coalfields Regeneration Trust and administered on their behalf by the foundation to tackle the social and economic problems faced by coalfield communities. Awards grants from £500 to a maximum of £10,000 but the majority of grants approved will be for amounts less than £5,000.

Community Champions

Offers small grants of up to £2000 for individuals living in Derby or Derbyshire who want to do something that will improve their community. The grant aims to help them turn ideas into reality.

Neighbourhood Renewal Unit

Part of the Government's National Strategy to provide funding from £50 to £5,000 to stimulate and support community activity, so that more people may become involved in the regeneration of their communities and neighbourhoods. This fund is open to all local community and voluntary groups working within Derby City priority wards.

The Local Network Fund

Aims to give local people the chance to make a difference to the lives of children and young people aged 0 - 19 years old. Grants between £250 and £7000 for projects that meet the themes of the fund

Community Empowerment Fund

Aims to open up communication channels between groups and organisations in the voluntary and community sector to share experiences and ideas and to ensure that

those normally excluded are given the full opportunity to participate.

FUNDERS' INITIATIVES ON AGEING (2)**ACTIVITIES**

With foundation funding, the Derbyshire Dales charity First Taste was able to provide ten sessions of interactive music to older people in two residential homes, encouraging participation and involvement.

TYPES OF SUPPORT

Building/renovation
Conferences/seminars
Equipment
General support/general purposes

APPLICATIONS

Application form and deadlines can be found on the website. Grants between £500 to £5,000 are available.

RESTRICTIONS

Does not give grants to individuals; replacement of statutory funding; general appeals; large national charities; political parties or evangelising religious organisations; or animal welfare.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Community foundation

LEGAL STATUS

Community foundation

GOVERNANCE

Michael Hall, Chair
Brian Ashby, President
Sir Richard FitzHerbert, President Emeritus
The Trustees
Helen Bishop
Arthur Blackwood
Ian Eames
Sylvia Green
Mollie Kirkland
Nick Mirfin
David Moss
Lucy Palmer
Roger Pedley
Ms Pat Taylor
Andrew Tomlinson
David Walker
Brigadier Edward Wilkinson
Robin Wood

HONORARY/ADVISORY COMMITTEE*Patron*

Lord Lieutenant John Bather JP

STAFF

Hilary Gilbert, Executive Director
 Rachael Grime, Executive Director
 Matthew Allbones
 Pam Butler
 Ella Ferris
 Sarah Hand
 Jagjit Kaur
 Abbi Kirk
 Robert Letman
 Misbah Ramzan
 Susie Sykes
 Amanda Whittam

PUBLICATION TYPES

Electronic/online information

FINANCIAL INFORMATION

2002	POUND STERLING	EURO
Total Gifts	155,863	220,301
Total Exp.	601,501	850,178
Grants Exp.	333,283	471,071

(Sources of information: Website; Verified by funder)

FONDAZIONE UMANA MENTE

YEAR OF not available

ESTABLISHMENT**PRIMARY ADDRESS**

Piazza Velasca 7/9
 Palazzo Mellerio
 20122 Milan
 Italy
 Tel.: +39.027.216.6446
 Fax: +39.027.216.6444
 E-mail: info@umanamente.it
 Web: www.umanamente.it

KEY CONTACT

Anna Venturino, General Manager

NAME IN ENGLISH

The UMANA MENTE Foundation

MISSION

To foster the widest possible range of specific action through close co-operation with non-profit bodies.

BACKGROUND

Established in 2001 by the Italian Insurance Group, Riunione Adriatica di Sicurtà (Ras), Fondazione UMANA MENTE is a charitable foundation as governed by the Italian Civil Code.

GEOGRAPHIC FOCUS

Italy

PROGRAMME AREAS

The foundation provides non-profit social and welfare bodies with funding for new projects targeting the disabled, elderly, poor, adolescents with problems, prisoners and drug addicts. The foundation's current priorities include:

- Prevention child abuse
- Rehabilitation for the disabled

Prevention of Child Abuse

Funds projects which target situations where problems are already manifest, in order to help children and adolescents who have undergone physical or psychological violence or neglect, or those who suffer from eating disorders or suicidal tendencies. Specifically, the foundation takes into consideration those interventions which aim to create second level centres; counselling centres; half-way houses; highly specialised day-care centres; support in the creation of family networks; foster homes and residential communities; support to the families of abused or troubled children.

Rehabilitation for the Disabled

Focuses on the rehabilitation of patients with Down's Syndrome. Support is granted to projects which develop activities and interventions in all areas of rehabilitation, including occupational, social and psychological rehabilitation, as well as experimental residential opportunities to help the patients adjust to new scholastic or work environments.

The foundation also considers projects that provide support to families with a physically or mentally disabled child. Support is awarded for the provision of psychological aid, the creation of self-help groups, recreational areas and emergency centres.

TYPES OF SUPPORT

Grants
 Programme development
 Research

TYPE OF FUNDER

Independent foundation

GOVERNANCE

Management Committee
 Giorgio Fiorentini
 Cristina Mondadori
 Adriano Propersi

Assunto Quadrio Aristarchi
Aurelia Rivarola
Benedetta D'Intino
Paolo Vagnone
Anna Venturino

STAFF

Anna Venturino, General Manager
Maria Elena Vivaldi, Senior Project Manager
Maria Gallo, Project Manager
Valerio Spiga, Project Manager
Angelo Villani, Project Manager
Michela Anelli, Assistant

PUBLICATION TYPES

Electronic/online information

SOURCES OF FUNDS

Income and earnings from the foundation's assets and activities; donations or testamentary bequests, that are not expressly destined for the endowment fund; other contributions made by the state, local bodies or other public organisation; income from the foundation's operations and any other related activities.

(Sources of information: Website)

FUNDACIÓN CAJA DE MADRID

YEAR OF 1991

ESTABLISHMENT

PRIMARY ADDRESS

Calle San Martin 5
28013 Madrid
Spain
Tel.: +34.91.521.3088
Fax: +34.91.523.0347
Web: www.cajamadrid.es

KEY CONTACT

Joaquin Planelles, Director

MISSION

In the field of culture, to support musical activities, plastic art and audiovisuals. In social services, to help the elderly and support the development of the non-profit sector.

BACKGROUND

The foundation was funded by Caja de Madrid Savings Bank and registered with the Ministry of Culture in 1990. Its budget and guidelines were approved in 1991, at which point the foundation commenced its activities.

GEOGRAPHIC FOCUS

Principally Spain

PROGRAMME AREAS

The foundation is active in two main areas:

- Culture
- Social services

Culture

- Music programme: for the promotion, teaching and research of music. This includes the organisation of concerts, production of a television programme and operatic productions; and
- Madrid Programme: to inform the people of Madrid about their history and cultural heritage. The foundation is involved in the publication of a book on the history of Madrid and the revision of an existing architectural and urban guide to the city.

Social Services

- Programme for the Elderly: includes research on the quality of life of elderly people and ways of improving assistance to this sector; the awarding of prizes for exceptional works on gerontology; residential homes; and care of single elderly persons in rural environments
- Third Sector Programme: develops new foundations and voluntary organisations and trains directors; and
- Establishing a home for children with AIDS

Foundation activities are carried out in collaboration with other public or private organisations.

TYPES OF SUPPORT

Bursaries for music studies
Research grants
Scholarships for relatives of terrorism victims
Travel grants

APPLICATIONS

Guidelines for research grants are available from the foundation.

RESTRICTIONS

Research grants are awarded to final-year students and postgraduates only.
No support is given for commercial activities.

LANGUAGES ACCEPTED

Spanish

GOVERNANCE

José Luis Acero Benedicto

José Mariano Benitez de Lugo Guillén
Iñigo Cavero Lataillade
Angel Montero Pérez
Isaac Ramos Festa
Alfredo Tejero Casajús
Jaime Terceiro Lomba

STAFF

Joaquin Planelles, Director

PUBLICATION TYPES

Annual report
Electronic/online information
Information brochures on foundation activities
Newsletter

FINANCIAL INFORMATION

2003	EURO	EURO
Total Assets	90,055,344	90,055,344
Total Exp.	149,000,000	149,000,000

SOURCES OF FUNDS

Caja de Madrid Savings Bank.

(Sources of information: Annual Report; EFC profile form)

FUNDACIÓN CAJA RIOJA

YEAR OF not available

ESTABLISHMENT

PRIMARY ADDRESS

La Merced, 6
Logroño
26001 La Rioja
Spain
Tel.: +34.941.27.0155
Fax: +34.941.25.9931
E-mail: fundacion@fundacion-cajarioja.es
Web: www.fundacion-cajarioja.es

KEY CONTACT

Dr Fernando Beltrán Aparicio, President

NAME IN ENGLISH

Caja Rioja Foundation

MISSION

To increase the cultural and social development of the Rioja community.

BACKGROUND

Fundación Caja Rioja was created to help the community of Rioja in the areas of cultural, social and modernisation development.

GEOGRAPHIC FOCUS

La Rioja, Logroño, Spain

PROGRAMME AREAS

Fundación Caja Rioja runs programmes that benefit the Rioja community in the areas of:

- Arts and culture
- Social assistance
- Education and research
- Historical preservation

Arts and Culture

Organises activities like expositions, music, theatre, conferences and seminars, and promotes the Youth Cultural Programme that encourages youths in the community to get involved artistically.

Social Assistance

Promotes the social integration of the elderly and people with disabilities and allows them to be involved in the activities provided to the Rioja community.

Education and Research

Encourages the continuous improvement and the professional training of educators and people in the community; supports social initiatives for education; and supports researchers who seek to improve the conditions of community rural life.

Historical Preservation

Carries out actions and extensive programmes that relate to the history, the culture and the natural environment of Rioja, thereby promoting the values of the autonomous community.

FUNDERS' INITIATIVES ON AGEING (2)

ACTIVITIES

The foundation recently subsidised the purchase of an electrocardiograph to improve diagnoses for the elderly living in the Residence Santa Justa de Logroño.

TYPES OF SUPPORT

Building/renovation
Conferences/seminars
Educational/training programmes
Programme development
Publications
Research

TYPE OF FUNDER

Community foundation

LEGAL STATUS

Non-profit cultural development foundation

STAFF

Dr Fernando Beltrán Aparicio, President
Dr Marcial González Arias, Vice President
Dr Jorge Albájar Barrón

Dr José Arnáez Vadillo
 Dr Orencio Cuartero Ezpeleta
 Dr Ernesto Felipe Gordo Casis
 Dr Fernando González Benito
 Dr Julián Jiménez Velilla
 Dr María Negueruela Gómez
 Dr Carmen Ortiz Lallana
 Dr Tomás Santolaya Sáenz
 Dr Santiago Tre Calavia

PUBLICATION TYPES

Electronic/online information

FINANCIAL INFORMATION

2002	EURO	EURO
Total Gifts	3,416,982	3,416,982
Total Exp.	3,413,501	3,413,501

SOURCES OF FUNDS

Annual endowment from Caja de Ahorros de La Rioja, subsidies, sales and services, and financial incomes.

(Sources of information: Website)

FUNDACIÓN RAMÓN REY ARDID

YEAR OF ESTABLISHMENT 1991

PRIMARY ADDRESS

Guillen de Castro, 2-4
 50018 Zaragoza
 Spain
 Tel.: +349.7674.0474
 Fax: +349.7674.0602
 E-mail: fundacion@reyardid.org
 Web: www.reyardid.org

KEY CONTACT

Dr. Alfonso Vincente, President

NAME IN ENGLISH

Ramon Rey Ardid Foundation

MISSION

To help people who are disabled or have a mental disease and to help the elderly and children who suffer, or are at risk of developing, some kind of disability.

BACKGROUND

The foundation was created to honour the university professor of psychiatry Dan Ramon King Ardid.

GEOGRAPHIC FOCUS

Spain

FORMER NAME

Fundación El Cierzo

PROGRAMME AREAS

The foundation concentrates its giving on three areas:

- Mental health
- Third age
- Early attention

Mental Health

Provides treatment and supervision for people who have a mental disease. Offers accommodation for these people at the Unit of Average Psychiatric Stay at the Professor Ramón King Ardid Residence.

Third Age

Helps the elderly by providing accommodation and treatment to improve the quality of life at their many residences and centres.

Early Attention

Provides treatment and support for children up to six years of age who have some kind of disability.

FUNDERS' INITIATIVES ON AGEING (2)

ACTIVITIES

The foundation manages several facilities for the elderly, which strive to maintain their autonomy and the independence, and value their physical, psychic, functional and social well-being. The aim of the foundation is to equip the surroundings of the elderly people under their care with the tools to improve their quality of life, and delay, as far as possible, their permanent admission to geriatric centres. In addition, the foundation conducts studies into the development of new services and resources for the elderly.

The foundation manages the following care structures:

- Residences
- Day centres

Residences

- Residencia de Mayores Alagón: belonging to the Government of Aragón (Aragonese Institute of Social Services), it has the capacity for 65 residents, of which 12 are valid, 37 attended, 13 with dementia and related pathologies and 4 seats are reserved for temporary residents
- Residencia de Mayores de Barbastro (Huesca) y Centro de Día: the residence is owned by the City Council of Barbastro (Huesca) and has a capacity of 96 people.

It also doubles as a Day Centre for 20 people

Day Centres

- Club Cervantes de Gallur (Zaragoza): the centre is owned by the Government of Aragón (Aragonese Institute of Social Services). The centre has a capacity of 80 people and the dining is hired out for functions.
- Centro de día de Calatayud (Zaragoza): owned by the Government of Aragón (Aragonese Instituta of Social Services), the centre provides occupational therapy, physiotherapy, medicine and health workers. The centre has a capacity of 20 seats.

TYPES OF SUPPORT

Building/renovation
Equipment
Grants to individuals

APPLICATIONS

Initial approach by letter.

RESTRICTIONS

Only funds programmes in the province of Zaragoza and Huesca.

LANGUAGES ACCEPTED

Spanish

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Non-profit foundation

GOVERNANCE

Dr. Alfonso Vicente, President
Dr. Bernardine Jiménez, Vice-President

STAFF

Manuel Hernandez Laplana, Manager
1 part-time staff
11 volunteers

PUBLICATION TYPES

Electronic/online information
Newsletters/periodicals

FINANCIAL INFORMATION

2001	EURO	EURO
Total Assets	3,127,714	3,127,714
Total Gifts	12,677	12,677
Total Exp.	3,645,065	3,645,065
Grants Exp.	3,553,493	3,553,493
European-level Exp.	20,017	20,017
Programme Exp.	3,553,493	3,553,493
Number of grants:	27	

SOURCES OF FUNDS

Government funding and donations.

AFFILIATIONS

EUROPSY

(Sources of information: Website; Verified by funder)

THE GROCERS' CHARITY

YEAR OF 1968

ESTABLISHMENT

PRIMARY ADDRESS

Grocers' Hall
Princes Street
London, EC2R 8AD
United Kingdom
Tel.: +44.20.7606.3113
Fax: +44.20.7600.3082
E-mail: anne@grocershall.co.uk
Web: www.grocershall.co.uk/charity.html

KEY CONTACT

Anne Blanchard, Charity Administrator

MISSION

To distribute funds for general charitable purposes, primarily in the field of education.

BACKGROUND

The Grocers' Charity is the charitable branch of The Worshipful Company of Grocers, a Livery company of the City of London. Although it has a long history of charitable activities, the charity was not formally established until 1968. It is administered by The Grocers' Trust Company Limited and the directors of that company are the members of the Court of Assistants of the Grocers' Company.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

The charity makes grants to registered charities in the following areas:

- Relief of poverty, including youth
- Education
- Medicine
- Disability
- Churches
- Heritage
- The arts
- The elderly
- General purposes

Relief of Poverty, Including Youth

Provides funding to projects that focus on children and young people, particularly those

at risk, to build confidence, share skills, and create opportunities.

Education

The major proportion of funding in this area is donated to educational establishments with links to the Grocers' Company, for internal scholarships and bursaries.

Medicine

Supports causes that improve medical facilities for sick people, including medical research.

Disability

Makes donations to a variety of organisations that provide support and services to disabled people of all ages.

Churches

Makes donations to churches with a historical connection to the Grocers' Company. Support is also given to the parochial houses that are under the patronage of the Grocers' Company, and for the payments made to the Parochial Church Councils of those parishes.

Heritage

Supports causes that preserve the heritage and history of the UK.

The Arts

Makes donations to causes that not only benefit the arts, but also in some way enable disadvantaged areas of society to participate in or benefit from the causes supported. For example the Almeida Theatre Company received funding to improve its disabled access.

The Elderly

Supports facilities and initiatives that benefit the frail elderly and provide them with care services to enable them to stay in their homes.

General Purposes

Makes donations to general causes of a deserving charitable nature with wider benefits to society.

TYPES OF SUPPORT

Building/renovation
Capital support
Continuing support
Educational/training programmes
Equipment
Research
Scholarships
Staff development
Student aid

APPLICATIONS

The charity does not issue an application form, but applications should be written on the registered charity's official headed notepaper, and should include full details of the projects referred to in the application. The latest audited accounts as well as a copy of the latest annual report of the organisation should accompany the appeal. Receipt of applications, which may be submitted at any time of the year, is not acknowledged, but all applications receive notification of the outcome in due course. All applications received are given due consideration with lists being circulated on a quarterly basis to the Education and Charities Committee. Initial approach by letter.

RESTRICTIONS

Only appeals from UK-registered charities are considered. Donations will not be made directly to individuals, but may be paid through registered charities. Unless there is a specific close and long-standing connection with the Grocers' Company, support is rarely given to cathedrals, churches and other ecclesiastical bodies; hospices; schools and other educational establishments; and research projects. Once an appeal succeeds, the applicant may not apply for funding until at least two years have elapsed from the date of the successful application. Unsuccessful applicants may be advised that a further request will not be considered until one year has elapsed from the date of the relevant application. Donations are of a single and non-recurring nature.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Corporate foundation

GOVERNANCE

Directors of the Grocers' Trust Company Limited
Hugh Bidwell
Hew Billson
Bruce Bossom
Francis Carbutt
Timothy Carter
His Honour Judge Simon Coltart
Lt. Col. John Dymoke
The Hon. Seymour Fortescue
Vice Admiral Sir Toby Frere
Crispin Gascoigne

Timothy Guinness
 Martin Hedley
 Christopher Holdsworth-Hunt
 The Rt. Hon. The Earl of Inchcape
 Robin Mackenzie
 William Martineau
 Paul Massey
 Nicolas McAndrew
 Giles Mounsey-Heysham
 Charles Nunneley
 Michael Pickard
 William Proby
 Lt. Col. John Smiley
 Alexander Sparks
 Andrew Stewart-Roberts
 Christopher Stewart-Smith
 Nicholas Taylor
 Julian Tregoning
 John Trotter
 Elliott Viney
 John Whitmore

HONORARY/ADVISORY COMMITTEE

Trustee

The Grocers' Trust Company Limited

STAFF

Brigadier Peregrine Rawlins, Secretary to the Grocers' Trust Company Limited
 Anne Blanchard, Charity Administrator

PUBLICATION TYPES

Annual report

FINANCIAL INFORMATION

2001	POUND STERLING	EURO
Total Assets	6,707,778	9,480,958
Total Gifts	300,843	425,220
Total Exp.	547,730	774,177
Grants Exp.	502,174	709,787
Number of grants:	158	

SOURCES OF FUNDS

The income provided from the trust fund together with a gift aid grant from The Grocers' Company and the income from covenants and donations made by members of the Grocers' Company together with miscellaneous income.

NOTES ON FINANCIAL INFORMATION

For the year ended July 31st 2001. The charity's assets consist of The Grocers' Trust Fund.

(Sources of information: Annual Report 2001; Verified by funder)

THE JERUSALEM FOUNDATION

YEAR OF 1966

ESTABLISHMENT

PRIMARY ADDRESS

11 Rivka Street
 P.O.B. 10185
 91101 Jerusalem
 Israel
 Tel.: +972.2.675.1763
 Fax: +972.2.673.4462
 E-mail: info@jerusalemfoundation.org
 Web: www.jerusalemfoundation.org

KEY CONTACT

Alan Freeman, Director of Overseas Coordination

MISSION

To strengthen, promote and enhance a free, open, pluralistic and modern society in Jerusalem.

BACKGROUND

The Jerusalem Foundation was founded 40 years ago by former Mayor Teddy Kollek. Since then, the foundation has implemented nearly 2,000 projects in Jerusalem. The foundation has created a wide infrastructure of civic and cultural institutions, through innumerable building projects and a network of programmes that span the entire life cycle; pre-natal care programmes, day-care centres, pre-school programmes, after-school enrichment activities, job training, recreation facilities, senior centres and frail-elderly programmes. Over the years, the foundation has also developed and implemented system-wide programmes that aim to break the cycle of poverty, improve education, promote coexistence among Jerusalem's diverse populations, and integrate special-needs populations into the mainstream community.

GEOGRAPHIC FOCUS

Jerusalem

PROGRAMME AREAS

The foundation has previously supported projects concerning: creating a solid infrastructure of community, health, and welfare-related services; constructing and renovating educational institutions; establishing cultural institutions, including museums, art schools, theatres, and

workshops; beautifying the urban landscape, from neighbourhood gardens to major parks; preserving and restoring religious and historical sites; bridging the gap between the city's diverse communities; and strengthening Jerusalem's status as a world capital. The foundation provides support to projects focusing on the following areas:

- Special needs education
- Libraries
- Co-existence dialogue and advancement of democracy
- Art schools and museums
- Schools
- Kindergartens
- Day-care centres
- Immigrant absorption
- Beautification of parks and gardens
- Historical preservation
- Cultural institutions, events and performing groups
- Advancement of the arts
- Development of community centres
- Senior citizens
- Children and youth at risk
- Domestic violence programmes
- Assistance for underprivileged families
- Assistance for the disabled
- Health and preventative medicine

TYPES OF SUPPORT

Awards/prizes
 Building/renovation
 Capital support
 Conferences/seminars
 Continuing support
 Educational/training programmes
 Equipment
 General support/general purposes
 Scholarship

APPLICATIONS

Initial approach by letter.

RESTRICTIONS

Only funds organisations based within the Jerusalem city limits.

LANGUAGES ACCEPTED

English, Hebrew and Arabic

TYPE OF FUNDER

Community foundation

LEGAL STATUS

Amutah (registered non-profit)

GOVERNANCE

Management Committee

Leadership

Dan Meridor, International Chair

Ruth Cheshin, President

Yossi Vardi

David Brodet, Chair of the Executive Board

Members

Tzvi Agmon

Yoram Belizovski

Meir Het

Amnon Pazi

Eitan Raff

Harry Sapir

Yossi Vardi

Moshe Vidman

Governing Committee

Moshe Aliesh

Oded Alisar

Danny Angel

David Arad

Tamara Barna

Selma Belkind

Yoram Berger

Amnon Eisenberg

Michael Federman

Martin Garstel

Professor Ruth Gavison

Ruth Gorenstein

David Hacoen

Fatera Haldet

Nahama Hilman

Rabbi Richard Hirsch

Ya'akov Hirsch

Yossi Kochik

Oded Jerry Leibler

Ephraim Levi

Raphael Molcho

Shlomit Molcho

Eilav Paesto

Moshe Raviv

Danny Rothschild

Yoran Sadan

Micha Shagrir

Amiram Sivan

Tzivia Tahores

Yoram Torbovitch

Yosef Uzieli

Professor Menachem Ya'ari

Professor Yermiyahu Yovel

Rina Zamir

Dan Ziskind

STAFF

Ruth Cheshin, President
 Danny Mimran, Vice-President
 Alan Freeman, Director of Overseas
 Coordination
 David Kindler, Chief Financial Officer
 37 full-time staff
 14 part-time staff

PUBLICATION TYPES

Annual report
 Electronic/online information
 Financial statements
 Information brochures
 Newsletters/periodicals
 Press releases

FINANCIAL INFORMATION

2003	EURO	EURO
Total Assets	70,683,975	70,683,975
Total Gifts	21,173,956	21,173,956
Total Exp.	16,703,148	16,703,148
Grants Exp.	14,619,185	14,619,185

SOURCES OF FUNDS

Contributions, rental income and financial income.

AFFILIATIONS

EFC Member

ADDITIONAL ADDRESSES

c/o La Fondation du Judaïsme Français
 72 rue de Bellechasse
 75007 Paris
 France
 Tel.: +33.1.5359.4747
 Fax: +33.1.5359.4750
 E-mail: french@jerusalemfoundation.org

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 126 Albert St.
 London, NW1 7NE
 United Kingdom
 Tel.: +44.207.482.6076
 Fax: +44.207.482.6025
 E-mail: uk@jerusalemfoundation.org

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 CH-8036 Zurich
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 Tel.: +41.1.462.0421
 Fax: +41.1.462.7775

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 2585 GD Hague
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 Tel.: +31.70.352.4171
 Fax: +31.70.351.2788
 E-mail: benelux@jerusalemfoundation.org

Martin-Buber-Str. 12
 14163 Berlin
 Germany
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 Fax: +49.30.8090.7031
 E-mail: german@jerusalemfoundation.org

Queen Mary Road 4950
 Quebec
 Montreal, H3W IX3
 Canada
 Tel.: +1.514.733.1895
 Fax: +1.514.733.8461
 E-mail: canada@jerusalemfoundation.org

Opemring I/R/3
 A-1010 Wien
 Austria
 Tel.: +43.1.587.0150
 Fax: +43.1.587.0154
 E-mail: german@jerusalemfoundation.org

Via Parigi 11
 00187 Roma
 Italy
 Tel.: +390.6.47.3901
 Fax: +390.6.48.1901
 E-mail: italy@jerusalemfoundation.org

(Sources of information: EFC membership application form; Verified by funder)

THE LANKELLY FOUNDATION

YEAR OF ESTABLISHMENT 1968

PRIMARY ADDRESS

2 The Court
 High Street
 Harwell, OX11 OEY
 United Kingdom
 Tel.: +44.1235.82.0044
 Fax: +44.1235.82.0044
 Web: www.lankelly-foundation.org.uk

KEY CONTACT

Peter Kilgarriff, Director

MISSION

To help in wide areas of social need and to respond to needs identified by those directly involved in the provision of services.

BACKGROUND

The Lankelly Foundation was established in 1968. Nine years later the founder, who in his lifetime always wished to remain

anonymous, established the Hambland Foundation. For many years the two foundations operated virtually as one trust, until September 1993 when the assets of the Hambland Foundation were wholly transferred to the Lankelly Foundation. In 1998, following the founder's death, the foundation received a generous legacy which significantly increased its grantmaking capacity. From its beginnings, the administration of the foundation has been linked to that of the Chase Charity.

GEOGRAPHIC FOCUS

UK, except Northern Ireland and Greater London

RELATED ORGANISATIONS

The Chase Charity

PROGRAMME AREAS

The foundation supports projects in the following areas:

- Arts
- Breaking the cycle
- Developing communities
- Heritage
- Free and quiet minds
- Offenders and society

Arts

Encourages access to the arts, in particular amongst those who historically have been least able to participate, such as those in rural areas or with special needs. Also supports those who aim to realise their artistic ability. The foundation focuses on the following areas:

- Arts and special needs: promotion of arts activities for people with special needs
- Dance: provision of dance to people of any age, ability or limiting circumstance; for instance, charities offering dance in prisons are equally as welcome as from those offering it to the elderly or those in rural areas
- Transgenerational work with communities: activities bringing together all ages in a community, whether urban or rural; an example of this would be a community play
- The pursuit Of excellence: the foundation runs a music award scheme to give concert platform experience to promising young musicians; and a glass award scheme which is open for students taking

a postgraduate course in Fine Art and Glass at the Central Saint Martins College of Art and Design

Breaking the cycle

Supports projects working to break cycles of abuse, violence, poverty and exclusion through work with families, children and young people.

Developing Communities

Assists the process of building a more inclusive society by supporting the activities of organisations that are community controlled and managed and responsive to the needs of all sections of their community. Working in partnership with other voluntary and statutory agencies, these organisations seek to tackle the needs of their community in a holistic way and put in place sustainable funding strategies to enable them to participate in the long-term development of their community providing opportunities for all to fulfill their potential. In addition, these organisations seek to create new employment opportunities that generate real wealth within communities.

Heritage

Supports projects that assist in preserving rural parish churches, almshouses and other historical buildings, particularly in rural locations.

Free and Quiet Minds

Supports charities tackling the issue of mental illness, particularly charities led by black or minority ethnic groups, wishing to provide services to their own community who are experiencing or recovering from a mental illness and to those who care for people with mental ill health. The foundation also seeks to work with charities focusing on people confined in secure hospitals or medium secure psychiatric units; and charities working in the field of the arts.

Offenders and Society

Seeks to strengthen voluntary and community sector agencies. Its aim is to encourage effective partnerships with the UK's prison and probation services which are designed to reduce offending behaviour and its impact on children, families and the wider community.

In addition to these main grantmaking priorities, for a limited period, the foundation will support projects that aimed at preventing

or tackling destitution among asylum seekers. To achieve this, the foundation will provide financial assistance to charities working locally to strengthen the infrastructure of small, emerging, voluntary refugee groups, through the provision of training or practical support; and providing a range of services to promote integration into the wider community.

TYPES OF SUPPORT

- Building/renovation
- Capital support
- Equipment
- General support/general purposes
- Programme development
- Staff development
- Technical assistance (by third party)

APPLICATIONS

An initial letter should be sent, detailing how much needs to be raised, what support has already been attracted, how soon the money needs to be raised and who else has been contacted for support. The letter should also contain brief information about the applying organisation's origin and status accompanied by the most recent set of annual reports and accounts. Full meetings of the trustees occur quarterly, and aim to deal with applications for grants of over £15,000 for one-off grants, or recurrent grants that come to more than £30,000 over a three-year period. Smaller applications are dealt with at interim meetings, and ratified by the full meeting of trustees. The foundation looks for user involvement as well as the proper use and support of volunteers, and the applicant will have to provide evidence of sound management and a commitment to equal opportunities. It recognises that the black voluntary sector and minority ethnic groups have particular needs and it welcomes applications from such organisations working within its broad priority areas. The minimum grant is £5,000 and grants are always made for specific purposes but they may cover capital or revenue needs. The foundation considers revenue support to a maximum of five years, although three-year support is more common.

Initial approach by letter.

RESTRICTIONS

The foundation only supports registered charities and it prefers to support community

initiatives to meet local needs. It will consider applications from large national charities but support will be rare and limited. It does not make grants to replace funds that have been withdrawn from statutory sources, or consider applications to replace time expired grants from the Community Fund or any National Lottery Board. The foundation does not make grants in support of adaptations to improve access to buildings; the advancement of religion; animal welfare; arts and heritage; conferences or seminars; endowment funds; festivals or theatre productions; hospices; individual needs; individual youth clubs; large capital projects; medical research; other grantmaking bodies; publications, film or video; schools for people with special needs; sport; travel, expedition or holidays; vehicles; or formal education including institutes of further and higher education, National Health Service Hospital Trusts and those emanating from associated charities concerned with medical projects.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

GOVERNANCE

- Shirley Turner, Chairman
- Georgina Campbell
- Leo Fraser-Mackenzie
- Wallace Mackenzie
- Colleen Merlyn-Rees
- Simon Raybould
- Nicholas Tatman

STAFF

- Peter Kilgariff, Director
- Susan Ash, Assistant Director
- Ailsa Hollond, Assistant Director
- Brian Whittaker, Assistant Director
- Barbara Garlick, Administrative Secretary
- Leigh Roll, Administrative Secretary
- Marian Durban, Office Manager
- 7 full-time staff

PUBLICATION TYPES

- Annual report
- Application guidelines
- Electronic/online information
- Financial statement
- Information brochures

FINANCIAL INFORMATION

2001	POUND STERLING	EURO
Total Assets	106,912,436	151,112,984
Total Gifts	351,891	497,372
Total Exp.	5,460,798	7,718,442
Grants Exp.	5,091,471	7,196,425
Number of grants:	285	

SOURCES OF FUNDS

Profits from investments, endowments and a donation from the Northwood Trust.

NOTES ON FINANCIAL INFORMATION

For the financial year ended March 31st 2001.

AFFILIATIONS

Association of Charitable Foundations

(Sources of information: Annual Report and Accounts 2004; Information brochures; Website; Application guidelines; Verified by funder)

NADACE EURONISA

YEAR OF 1995

ESTABLISHMENT**PRIMARY ADDRESS**

Rumjancevova 3
46001 Liberec 1
Czech Republic
Tel.: +420.48.525.1947
Fax: +420.48.510.2753
E-mail: euronisa@nexta.cz
Web: www.euronisa.cz

NAME IN ENGLISH

Euronisa Foundation

MISSION

To help people live normal lives regardless of their age, social background or physical health.

BACKGROUND

Nadace Euronisa was founded in 1995 by the Moravian church in Liberec which traditionally focused on social, educational and cultural areas. The foundation aims to re-establish these practices.

GEOGRAPHIC FOCUS

Mainly in the Czech sector of the Nisa Euroregion (districts of Liberec, Jablonec nad Nisou, Semily, Ěeská Lípa and the Šluknov area)

PROGRAMME AREAS

The foundation works to improve and enrich the life of both physically and mentally disabled youth; to help elderly, sick and lonely people in their everyday life; and to support projects and activities for the prevention of HIV/AIDS and drug abuse, among other things. The foundation focuses mainly on the following areas:

- Social care
- Youth
- Projects

Social Care

Provides assistance to elderly, infirm and abandoned people to improve their quality of life.

Youth

Helps improve and enrich the lives of physically disabled youth so that they may play a fuller role in society.

Projects

Funds social, health, educational and cultural projects.

TYPES OF SUPPORT

Gifts in kind
Programme development

LANGUAGES ACCEPTED

Czech

TYPE OF FUNDER

Fund-raising foundation

GOVERNANCE*Board of Directors*

Zdeník Fejfar, Chair

Karel Brodský

Vladimír Herman

Jan Šolc

Pavel Valčík

Jaroslav Zámečník

Supervisory Board

Vira Bernardová, Chair

Milada Hejná

Josef Votrubec

HONORARY/ADVISORY COMMITTEE*Advisory Board*

Otto Jelínek, Chair

Jaromír Adamec

Miroslav Antoř

Pavel Bárta

Oto Chuchlík

Zdeník Kadlas

Jaroslav Kařpar

Marie Matyášová

Jiří Šetlík CS
Tomáš Sláma
Marie Ulrichová

STAFF

Dipl. Ing. Aleš Rozkovec, Director
Lydie Halamová, Secretary
Dagmar Rajnová, Accountant

PUBLICATION TYPES

Annual report
Electronic/online information

FINANCIAL INFORMATION

	CZECH CROWN	EURO
Total Gifts		32,810
Total Exp.		15,180

*(Sources of information: Annual report;
Website)*

NORMAN COLLINSON CHARITABLE TRUST
--

YEAR OF 1979

ESTABLISHMENT

PRIMARY ADDRESS

30 Main Street
Wetwang
Drifffield, YO25 9XJ
United Kingdom
Tel.: +44.137.723.6262

KEY CONTACT

Diane Hepworth

MISSION

To pay the income and any part of the capital of the trust fund to such lawfully registered charities or for such lawful charitable purposes and in such a manner as they think fit.

BACKGROUND

The trust is a registered charity governed by a trust deed dated January 1979.

GEOGRAPHIC FOCUS

York

PROGRAMME AREAS

Core costs, one-off payments, project and running costs are provided for up to one year to the following social risk areas: young people, the aged, infirm and the handicapped, or to individuals or organisations who provide assistance to such people. Also considered are Christians, at risk groups, those disadvantaged by poverty, carers,

disaster victims, the homeless and victims of abuse.

TYPES OF SUPPORT

Financial

APPLICATIONS

Applications from organisations should include all details of their officers and recent accounts/or budget. Applications received from individuals must come through recognised agencies. The trust holds twelve monthly meetings to consider applications, normally on the second Tuesday in the month. The deadline for receiving applications is seven days before the meeting.

RESTRICTIONS

Funding is restricted to York, and for the benefit of the people of York.

TYPE OF FUNDER

Independent foundation

GOVERNANCE

B. Catton
F.E. Dennis
D.C. Fotheringham
D.B. Holman
J.M. Saville

PUBLICATION TYPES

Trustees Report

FINANCIAL INFORMATION

2002	POUND STERLING	EURO
Total Exp.	139,921	197,768

(Sources of information: Internet)

ORANJE FONDS

YEAR OF 1948

ESTABLISHMENT

PRIMARY ADDRESS

P.O. Box 90
3980 CB Bunnik
Netherlands
Tel.: +31.30.65.64524
Fax: +31.30.6562.2204
E-mail: info@oranjefonds.nl
Web: www.oranjefonds.nl

KEY CONTACT

R.C. van der Giessen, Managing Director

NAME IN ENGLISH

Oranje Foundation

MISSION

To promote social welfare.

BACKGROUND

In 2002, the Oranje Fonds joined with the Juliana Welzijn Fonds, with the new organisation keeping the name Oranje Fonds. The Juliana Welzijn Fonds was set up on the day that Princess Juliana ascended to the Dutch throne. The original intention of the founders was to make financial aid available to institutions concerned with social welfare. The foundation in recent years interpreted this in the broadest sense, to include self-help groups and community organisations. Crown Prince Willem-Alexander and Princess Máxima oversee the Oranje Fonds.

GEOGRAPHIC FOCUS

Netherlands, nine countries in Central and Eastern Europe, and former Dutch colonies

FORMER NAME

Juliana Welzijn Fonds

PROGRAMME AREAS

The foundation redistributes donations from individuals and from companies through its programmes. Programmes are divided into two broad areas of activity:

- Aid and care
- Socio-cultural work

Aid and Care

Supports social work, voluntary (emergency) services, care for the elderly and self-help groups.

Socio-cultural Work

Concentrates on youth centres, sports as a catalyst for social cohesion, centres for the elderly, minority projects and community centres.

TYPES OF SUPPORT

Equipment
General support/general purposes
Publications

APPLICATIONS

Contributions are available for activities that cannot be covered by an organisation's regular budget such as initial costs, investments, stimulation of expertise, public relations activities and the development of new methodologies. Finance is supplementary and never covers 100% of costs. Applications can be made at any time on a standard application form. Smaller grant requests may be processed by the office itself. Other applications are presented to committees for assessment. External advice is sought with notification within five

months. Appeals are accepted in writing within 30 days. Organisations applying for grants are usually working at the local level regardless of whether they receive government support.

Initial approach by letter.

RESTRICTIONS

No grants to individuals, or for health, the environment, the arts, education, housing or development aid.

LANGUAGES ACCEPTED

Dutch and English

TYPE OF FUNDER

Independent foundation

GOVERNANCE

H.R. Okkens, Chair
R.G.C. van den Brink, Treasurer
R.C. van der Giessen, Secretary
J.P. Bensch
N. de Jong
H.M.A. Opstelten
J. van Rijn
P. Schnabel
A.G. van der Stoel
Y.I. Tümer
P. Vlaardingerbroek
J. Wallage
M.J. Chr. Worrell
G.J. Wyers

STAFF

R.C. van der Giessen, Managing Director
Theo van Oosten, Deputy Managing Director
7 full-time staff
17 part-time staff

PUBLICATION TYPES

Annual report
Electronic/online information
Information brochures

FINANCIAL INFORMATION

2003	EURO	EURO
Total Assets	169,840,939	169,840,939
Total Gifts	17,652,194	17,652,194
Total Exp.	15,230,685	15,230,685
Grants Exp.	13,429,064	13,429,064
Number of grants:	1,710	

SOURCES OF FUNDS

Interest on endowment, lottery proceeds, donations.

AFFILIATIONS

EFC Founding Member

(Sources of information: Annual Report 2003; Website; Verified by funder)

THE PERCY BILTON CHARITY

YEAR OF 1962

ESTABLISHMENT

PRIMARY ADDRESS

Bilton House
54/58 Uxbridge Road
Ealing
London, W5 2TL
United Kingdom
Tel.: +44.20.8579.2829
Fax: +44.20.8567.5459

KEY CONTACT

Grants Administrator

MISSION

To distribute one-off payments to youth organisations and charities providing aid to the disabled, both mentally and physically, the elderly, and disadvantaged youth.

BACKGROUND

The charity was established in 1962 by the late Percy Bilton for exclusively charitable objects.

GEOGRAPHIC FOCUS

UK

PROGRAMME AREAS

Distributes small grants for charities dealing with the following social issues:

- Disadvantaged youth
- The disabled
- The elderly

Disadvantaged Youth

Provides grants for furnishings and equipment to aid underprivileged or at risk young people, through educational and recreational support.

The Disabled

Seeks to encourage disabled people to gain a greater degree of independence, and to help in the provision of suitable accommodation for respite, occupational and recreational establishments.

The Elderly

Supports schemes for the relief of poverty isolation and loneliness, and encourages active participation in community projects, self-help and independent living schemes. Particularly focuses on the needs of the frail and sufferers of dementia. It also provides single capital donations.

TYPES OF SUPPORT

Capital support

Equipment

APPLICATIONS

The charity does not use an application form for main funding. It may be contacted for a copy of its application guidelines. Each application must contain sufficient information on the request before it can be considered. The charity reserves the right to make a site visit. Applications may be made for two kinds of grants. The first is a small one-off payment of up to £500 for furnishings and equipment. The second is a single capital donation in excess of £2,000 for any one project. The board's decision will be made known to the applicant as soon as practicable. Funding may be re-requested after a period of 12 months following rejection. Applications may be submitted at any time during the year, but are considered by the board quarterly, in March, June, September and December. Applications for small grants should be made to the Small Grants Committee and applications for main funding to the Administrator. Initial approach by letter.

RESTRICTIONS

Grants are only made to registered charities or youth organisations in the UK. The charity will not consider applications for donations for general funding; the arts (theatre, dance groups); unemployment projects; general 'circularised' appeals; general running expenses; bursaries; expeditions; overseas projects; salaries; research; organised playschemes, holidays or trips; or minor building or conversion works that fall outside approved categories.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Charitable company

GOVERNANCE

Directors

W.J.D. Moberly, F.C.A., Chair
M.A.G. Bilton
J.R. Lee
S.J. Paciorek
W.J. Veielli

STAFF

Priya Ponnalyah, Company Secretary
4 full-time staff

1 part-time staff

PUBLICATION TYPES

Annual report
Application guidelines

FINANCIAL INFORMATION

2002	POUND STERLING	EURO
Total Assets	16,985,647	24,007,982
Total Exp.	1,026,687	1,451,148
Grants Exp.	775,935	1,096,728

Number of grants: 1,083

SOURCES OF FUNDS

Endowment fund.

NOTES ON FINANCIAL INFORMATION

The accounting year runs from April 2001 to April 2002.

(Sources of information: Application guidelines; Verified by funder)

VÝBOR DOBRÉ VULE - NADACE OLGY HAVLOVÉ

YEAR OF 1992

ESTABLISHMENT

PRIMARY ADDRESS

Mailing Address
P.O. Box 240
11121 Prague
Czech Republic
Tel.: +420.224.21.7061
Fax: +420.224.21.7082
E-mail: vdv@telecom.cz
Web: www.vdv.cz

KEY CONTACT

Hana Haráková

NAME IN ENGLISH

The Committee of Goodwill - Olga Havel Foundation

MISSION

To provide aid to NGOs who support health care, education and social assistance, as well as helping the disadvantaged and defending human rights.

BACKGROUND

The Olga Havel Foundation grew out of the Committee of Good Will, which was founded in 1990 by the first wife of the president of the Czech Republic to defend the rights of disadvantaged people and to aid their full integration into society.

GEOGRAPHIC FOCUS

Czech Republic and Slovak Republic

RELATED ORGANISATIONS

Charter 77 Foundation, Prague

PROGRAMME AREAS

The foundation seeks to defend human rights and aid the integration of the disadvantaged back into society through the following programmes:

- Health care
- Education
- Social and health care sector
- Human rights
- Olga Havel award

Health Care

Provides health care support in many different areas, including the prevention of cancer, and assisting women and children with the disease. The foundation also supports the education of specialist staff in play therapy for children in hospital. Supports a programme for the prevention of asthma in children; and education of parents and teachers regarding relations to children with asthma. Supports the improvement of knowledge among specialist health care personnel and the parents of children with cystic fibrosis. The foundation receives gifts in kind from some manufacturers of medical equipment and pharmaceutical products which the foundation passes on to the patients in need.

Education

Aims to improve education through its Education Fund which provides grants to gifted physically disabled children and children from children's homes to further their studies. The foundation also runs the Salzberg Cornell Medical Seminars for experts and NGO's.

Social and Health Care Sector

Provides social assistance to the disadvantaged through the following:

- Holidays for children
- Establishment of a halfway house to provide a refuge for children and young people in difficulty
- Programmes of street work
- Refuge for mother and child and homeless people
- Pathways to Integration Programme: provides aid and contributions towards reconstructing buildings to provide easy

access for the disabled; employment for people with disabilities

- Rehabilitation of disabled people
- Supporting foster families caring for children from children's homes
- Cooperation with associations and charitable institutions which offer an active and dignified life to the elderly
- Single contributions to cover emergency expenses relating to living conditions of those in need

Human Rights

Supports education and cultural activities within the Roma communities to enhance dialogue and mutual understanding between different ethnic groups.

The Olga Havel Award

The foundation awards this annual sum to a person with a disability who helps other people in need. This event enables the public to recognise the contributions of people with disabilities in society.

FUNDERS' INITIATIVES ON AGEING (2)

ACTIVITIES

Provides help to civil associations and charitable institutions, which actively support the improvement of living conditions of our older generation, and strengthen the dignity of those who no longer can take care of themselves.

TYPES OF SUPPORT

Awards/prizes
Building/renovation
Conferences/seminars
Educational/training programmes
Equipment
Fellowships
Gifts in kind

APPLICATIONS

The Olga Havel foundation renders grants to associations, charity institutions, private individuals, and schools but explicitly for projects described on the foundation's website, where full application guidelines can be found.

Initial approach by letter.

RESTRICTIONS

Does not accept requests from entrepreneurial organisations; for running costs of organisations; refunds for medical treatment in private hospitals; car purchases;

free-time activities and sports; air cleaners for individuals; loans or debts.

LANGUAGES ACCEPTED

Czech and Slovak

TYPE OF FUNDER

Fund-raising foundation

GOVERNANCE

Dana Nemcová
Franziska Sternbergová
Ivan Douda
Ivan M. Havel
Václav Malý
Jaroslava Moserová
Miloš Rejchrt
Milan Tománek
Ljuba Václavová

HONORARY/ADVISORY COMMITTEE

Helena Navrátilová
Magdalena Pištorová
Jan Stolár

STAFF

Milena Cerná
Ludmila Stocesová
Eva Kvasnicková
Gabriela Türkeová
Vera Kubátová
Petr Hanzal
4 full-time staff
4 part-time staff
10 volunteers

PUBLICATION TYPES

Annual report
Electronic/online information
Information brochures
Monographs

FINANCIAL INFORMATION

2001	CZECH CROWN	EURO
Total Assets	43,409,000	1,423,545
Total Gifts	20,182,040	661,845
Total Exp.	23,337,371	765,320
Grants Exp.	15,167,866	497,411
Programme Exp.	8,169,505	267,909
Number of grants:	694	

SOURCES OF FUNDS

Gifts from individuals and companies, legacies and the proceeds of fund-raising activities. Significant assistance is received from overseas sister organisations of the Olga Havel Foundation.

AFFILIATIONS

Olga Havel Foundation's sister organisations in the US, Great Britain, Norway, Germany and Switzerland

ADDITIONAL ADDRESSES

Visiting Address
Senovážné náměstí 2
11121 Prague 1
Czech Republic

*(Sources of information: Annual Report 1999;
Information brochures; Verified by funder)*

W.P.SCHMITZ-STIFTUNG

YEAR OF 1985

ESTABLISHMENT

PRIMARY ADDRESS

Volmerswerther Straße 80
40221 Düsseldorf
Germany
Tel.: +49.211.398.3770
Fax: +49.211.398.3782
E-mail: schmitz-stiftung@t-online.de
Web: www.schmitz-stiftung.de

KEY CONTACT

Michael Dirx, Operational Manager

NAME IN ENGLISH

Schmitz Foundation

MISSION

To make an effective contribution to combating poverty and promoting understanding among the people of the world.

BACKGROUND

The W. P. Schmitz Foundation, created by Werner Peter Schmitz, was established in 1985 as a non-profit foundation for development aid in accordance with the terms of the laws of the German State of North-Rhine Westphalia. Its scope has expanded greatly in the course of many years of intensive work. In 1996, to meet the increased demands, Mr Schmitz set up the Schmitz-Hille Foundation located in Thun, Switzerland. The Schmitz-Hille Foundation and the W. P. Schmitz Foundation maintain a joint administrative office in Düsseldorf.

GEOGRAPHIC FOCUS

Worldwide

RELATED ORGANISATIONS

Schmitz-Hille Stiftung

PROGRAMME AREAS

The Schmitz Foundations give their support mainly for projects in the following sectors:

- Job training – skills and crafts for young people
- School education for children and young people
- Rural health care, hygiene and water supply
- Agricultural production and food supply
- Craft-based businesses and support for small-scale enterprises
- Microcredit schemes
- Re-socialisation of street children
- Support and integration of the handicapped
- Positive action for women and children
- Support and care of old people
- Handling and avoiding conflict situations

TYPES OF SUPPORT

Programme development

APPLICATIONS

For an initial assessment, outline project proposals (in German or English) should be submitted to the foundations, where possible by e-mail. For this purpose applicants are requested to make use of the online application form. If, after an initial assessment, the foundations see any possibility of funding, applicants will be asked to submit a detailed project application using the standard application form. When submitting proposals for larger-scale projects requiring public funding, applicants are requested to check the official application guidelines issued by the German Ministry of Economic Co-operation (BMZ) and Development and the European Union (EU).

RESTRICTIONS

Does not provide financial support to individuals, for example, through scholarships or by paying hospital expenses.

LANGUAGES ACCEPTED

German or English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

non-profit organisation registered under German law

GOVERNANCE

Board of Trustees
Prof Dr Winfried Pinger
Ute Rössing

HONORARY/ADVISORY COMMITTEE

Foundation Advisory Council

Werner Peter Schmitz, Chair

Bernd Dreesmann

Dr Urs Neuenschwander

Werner Riebschläger

Peter Schneider

STAFF

Ursula Bonin, Project Manager

Wolfgang Deppen, Project Manager

Michael Dirxx, Operational Manager

Ralf Kresal, Operational Manager

Erika Monaghan, Office Manager

SOURCES OF FUNDS

Donations

(Sources of information: Website)

THE YAPP CHARITABLE TRUST

YEAR OF 1999

ESTABLISHMENT

PRIMARY ADDRESS

47a Paris Road

Scholes

Holmfirth, HD9 1SY

United Kingdom

Tel.: +44.1484.68.3403

Fax: +44.1484.68.3403

E-mail: yapp.trust@care4free.net

Web: www.yappcharitabletrust.org.uk

KEY CONTACT

Margaret Thompson, Administrator

MISSION

To help smaller charities, especially those tackling difficult or less popular work; and to support charities working with elderly people and those working in Wales or Northern Ireland.

BACKGROUND

Originally two charitable trusts were set up, using funds bequeathed by William Johnston Yapp, who died in 1946. These operated as The Yapp Welfare Trust and The Yapp Education and Research Trust until September 1999, when they were combined into The Yapp Charitable Trust.

GEOGRAPHIC FOCUS

UK

FORMER NAME

The Yapp Welfare Trust

PROGRAMME AREAS

The trust makes grants for work with:

- Elderly people
- Children and young people
- People with disabilities or mental health problems
- People trying to overcome life-limiting problems such as addiction, relationship difficulties, abuse, or a history of offending

The trust also makes grants to support charities' work in the fields of education and learning, including lifelong learning; and scientific and medical research.

FUNDERS' INITIATIVES ON AGEING (2)

ACTIVITIES

Includes grants for work with elderly people as a priority area. Recent grants have included £6000 over 3 yrs to Age Concern Ledbury & District towards running costs and £1500 to Latin American Elderly Project towards the cost of English and Keep-Fit classes.

TYPES OF SUPPORT

Programme development

APPLICATIONS

Applicants must complete a simple form that is obtainable from the trust's administrator. The trustees meet three times per year to consider applications, usually in March, July and November. Applications should have reached the trust by January 31st (for March); May 30th (for July) and September 30th (for November). For summer holiday projects please apply to the November or March meeting as the July meeting takes place too late for replies to be sent before the project starts.

RESTRICTIONS

Does not fund individuals, including students undertaking research, expeditions or gap year projects; groups that do not have their own charity registration or exemption; or fund-raising groups raising money to benefit another organisation. Does not fund charities whose normal expenditure is over £75,000 a year; work with children under five years of age; child care; holidays and holiday centres; core funding of general community facilities such as community centres and village halls; or any capital expenditure, including buildings, renovations, extensions, furnishings, equipment, or minibuses.

LANGUAGES ACCEPTED

English

TYPE OF FUNDER

Independent foundation

LEGAL STATUS

Registered charity

STAFF

Margaret Thompson, Administrator
1 part-time staff

PUBLICATION TYPES

Application guidelines
Electronic/online information

FINANCIAL INFORMATION

2001	POUND STERLING	EURO
Total Assets	5,327,600	7,530,177
Total Exp.	322,800	456,254
Grants Exp.	299,000	422,615
Number of grants:	101	

SOURCES OF FUNDS

Interest on endowment.

NOTES ON FINANCIAL INFORMATION

For financial year October 2000 to
September 2001.

AFFILIATIONS

Association of Charitable Foundations (ACF)

*(Sources of information: Application guidelines;
Website; Verified by funder)*

TABLE OVERVIEW

Independent Funder	Country of Origin	Focus of Activities	Types of Support
Anglo-German Foundation for the Study of Industrial Society	UK	Social policy, employment policy	Projects, events, publications
Atviros Lietuvos Fondas	Lithuania	Impact of EU Enlargement: rights of older people, access to information for older people, public awareness, active civic participation	Events
Bertelsmann Stiftung	Germany	public perception of ageing, new models for work participation, living and housing, pension reform, social and economic impact of ageing society, geriatric rehabilitation and nursing care	Public campaigns, publishing, advocacy for policy reform, research and monitoring, events
Blagotvoritelny Fond razvitiya goroda Tyumeni	Russia	Welfare	non-profit support
Boots Charitable Trust	UK	Health care	Financial support
Bridge House Estates Trust Fund	UK	volunteerism, transport and access, health and fitness, independent living skills, education, social inclusion, tackling poverty, housing and benefits, residential care standards, information and advocacy, outreach	Project support

Carnegie United Kingdom Trust	UK	Quality of services, public policy, volunteerism, labour market and livelihood	Publications, advocacy, financial support
Centrica plc	UK	Fuel poverty, social inclusion, home security, support for carers	Projects and partnership with non-profit
Charles Hayward Trust	UK	Quality of life, residential care, (community) care services, social inclusion, recreational activities, focus on ethnic minorities	Projects
Community Foundation for Wiltshire and Swindon	UK	projects tackling isolation; dealing with rural transport and services and working with people who are isolated because of illnesses or for cultural reasons	community care
Community Fund/Big Lottery Fund	UK	Mobility	Access schemes
Compagnia di San Paolo	Italy	Social welfare, poverty relief, social inclusion	Financial support
Co-operating Netherlands Foundations for Central and Eastern Europe	Netherlands	Social welfare, public health and education	Projects

Dagmar and Václav Havel Foundation Vize 97	Czech Republic	Independent living, hardship relief	Financial support
Derbyshire Community Foundation	UK	Quality of life	Financial support
Esmée Fairbairn Foundation	UK	Education (distance learning resources and intergenerational programmes), quality of life	Partnership, financial support
Fondation Caisses d'Epargne	France	Independent living; public perception of ageing, support for carers, quality of life; intergenerational activities; residential services, use of new technology for home help	Community projects, management services, technology development, development of support systems, public awareness activities
Fondation Claude Pompidou	France	Volunteerism, social clubs, nursing and residential care, professional training, memory rehabilitation, Alzheimer's disease, outpatient services	Partnership, capital support, scholarships, management services, promotional activities
Fondation de France	France	Social inclusion, training, independent living, night care assistance, access schemes	Financial support

Fondation Nationale de G�rontologie	France	human rights, intergenerational projects, health care	literary prize, training, information services, publications, research and evaluation, partnerships, events
Fondazione Cassa di Risparmio delle Provincie Lombarde	Italy	Social housing and services, social inclusion	Financial support
Fondazione Rodolfo DeBenedetti	Italy	Pension and welfare reform (including pension entitlement), demographic change	Research, advocacy, events, lectures
Fondazione UMANA MENTE	Italy	Non-profit support	Financial support
Funda�o Calouste Gulbenkian	Portugal	Intergenerational activities, home care support, residential care standards (including day and night care services)	Financial support
Fundaci� 'La Caixa'	Spain	Senior citizen centres, volunteerism, intergenerational activities, use of new technologies, information services and cognitive stimulation activities for people suffering with Alzheimer's and Parkinson's, support for carers, research on neurogenerative diseases	Events, partnership, financial support, research

Fundación Caja de Madrid	Spain	Quality of life of elderly people, gerontology, innovative projects, elderly in rural environment	research, prizes
Fundación Caja Rioja	Spain	Acquisition of geriatric equipment	Financial support
Fundación María Francisca de Roviralta	Spain	Acquisition of geriatric equipment, quality of life, nutrition and hygiene, creativity and self-esteem initiatives, income generating activities	Projects, collaboration
Fundación Ramón Rey Ardid	Spain	Residential care, independent living skills, social well-being activities	Management services
Fundación Telefónica	Spain	Social uses of information technologies	Promotional activities, technical support
Herman Bouma Fonds voor Gerontechnologie Stichting	Netherlands	Gerontechnology - where technology is directed towards the aspirations and opportunities of the elderly, research	Financial support, scholarships, events, publications
Johnson & Johnson	Belgium	Integrated care, local health care networks, intergenerational activities, dementia expertise centres, Alzheimer's disease, peer advocacy services, independent living, fitness and mobility, home help, day care centres, provision of equipment	Financial support, events

Joseph Rowntree Foundation	UK	Independent living skills, residential care services, sustainable models for long-term care, empowerment, active participation in policy reform	Research, development, advocacy
Körber-Stiftung	Germany	Recreational activities, multicultural gatherings, education	Funder-operated programme, financial support
Kuntoutussäätiö	Finland	Rehabilitation, health and equal opportunities and working life	Expertise, research and development, and training and information services
Nadace Euronisa	Czech Republic	Social care assistance, quality of life.	Financial support, programme development
Norman Collinson Charitable Trust	UK	Social welfare	Financial support
Oranje Fonds	Netherlands	Social centres, self-help groups, voluntary services, social work	Financial support
People in Need Trust	Ireland	Care services	Financial support

Rayne Foundation	UK	Home-visiting pharmaceutical care services, mental illness, particularly depression or dementia, and evaluation of care service models.	Financial support, research
Robert Bosch Stiftung GmbH	Germany	Higher education and professional training, demographic studies, research on health care models, volunteerism, professional exchange projects in CEE, quality of life, dementia, care, handicapped retirees, 'Future AGE' prize for nursing, environment enhancement, ageing immigrants	Training, research, awards and prizes, events, scholarships, funder-operated programmes, financial support
Stefan Batory Foundation	Poland	Intercultural understanding, knowledge transfer,	Financial support, lectures meetings, workshops, language classes
Stichting Het R.C. Maagdenhuis	Netherlands	Building and renovation of nursing homes, residential homes and other care structures, innovative projects	Financial support
Stiftelsen Riksbankens Jubileumsfond	Sweden	Research on ageing and age-related illnesses	Financial support
Tesco	UK	social inclusion, poverty relief, welfare services	collaboration, fundraising, employee volunteerism

The Atlantic Philanthropies	Ireland	volunteerism, access to health and support systems, housing, altering public perception of ageing, education	research, public awareness/use of media, advocacy, programme development, professional training
The Balance Foundation	UK	Models for service delivery, support for carers, befriending schemes, caring and housing solutions, credit action schemes	Advocacy, information services, financial support
The Community Foundation for Northern Ireland	UK	Social welfare	Support for self-help groups
The Grocers' Charity	UK	Health and care services, independent living	Financial support
The Henry Smith Charity	UK	Housing and support services, befriending services, home repair, safety equipment among other things.	Financial support
The Jerusalem Foundation	Israel	creating a solid infrastructure of community, health, and welfare-related services	General support

The Lankelly Foundation	UK	Intergenerational activities through the arts	Project support
The Percy Bilton Charity	UK	Poverty relief, social inclusion, community participation, self-help, independent living schemes, health with specific focus on dementia	Financial support
The Worshipful Company of Information Technologists' Charitable Trust	UK	IT skills, drop-in centre	Equipment, training, technical assistance, funder-operated programme, financial support
The Yapp Charitable Trust	UK	Organisation support	Financial support
Tudor Trust	UK	Social and independent living, intergenerational activities, dementia, services for ethnic minority communities	Financial support
Výbor dobré vůle - Nadace Olgy Havlové	Czech Republic	Quality of life, mobility	Financial support
W.P.Schmitz-Stiftung	Germany	Social welfare	Financial support