



HALIFAX

FOUNDATION

for Northern Ireland



Annual Review

2022

Chair and Chief Executive's Report 2022

The year began with an air of positivity as the impact of COVID-19 had started to loosen its grip on society, not least the community and voluntary sector here in Northern Ireland. However, a further crisis was brewing that would deal another hammer blow to the Sector in the form of the cost-of-living crisis. Electricity and gas costs substantially increased for community venues, as well as increased rent costs for many. Once again, we highlighted our commitment to our grantees, flexing budgets to suit the soaring core costs. We were elated when having approached our sole donor, Lloyds Banking Group with our concerns, that they remained true to their aim of being 'by your side'. They donated an additional £107,000 in funding to directly support our groups with cost-of-living support, for which we are most grateful.

In 2022, Lloyds Banking Group PLC transferred to the Foundation £1,375,206 as part of its ongoing commitment to support our charitable activities. This figure includes a total of £26,101 of in-kind income, supporting the audit and administration of the Foundation, as well as the cost-of-living support payment of £107,000. The Board of the Foundation is most grateful to the directors, management, and staff of Lloyds Banking Group PLC for the continuity and stability of this funding; funding which allowed us to continue to provide support to the charity sector during an extremely pressured time.

Through our Community Grants Programme, we continued to offer support to charities working specifically with disadvantaged and disabled people. In keeping with Charity Commission guidance, we only accepted applications from organisations that are either formally registered as charities or in the process of doing so, the latter being included on the Charity Commission's "combined list". In addition, our broadened portfolio of grants also continued, including Large, three-year grants and Special Initiatives, two-year infrastructure awards as we planned to offer in our strategy 'A Vision for the Future' 2020 – 2023.

During the year, we received 360 applications, and offered grants to 231 organisations across our grant programmes,

totalling £1,171,747. This exceeded our target set of 200 organisations supported. The number of applications represents an increase on the previous year of 31% which we believe is evidence of the sector reigniting following on from the uncertainty brought about by COVID-19 restrictions, but also highlights the need for additional support due to the cost-of-living crisis. Grantees told us on their application forms that a total of 235,584 people would benefit from our funding (250,000 beneficiary target). A full list of our awarded grants can be found on our website at <https://www.halifaxfoundationni.org/recently-funded-grants-360-giving>.

We continued to administer the Matched Giving Programme for Bank employees. In this arrangement, the Foundation matches both the cash sums raised for chosen charities by Halifax Bank staff. As face-to-face fundraising continued to decrease, colleagues became more creative and innovative in finding ways they could continue to support charities close to their hearts during this turbulent time. They took part in wild water swimming, singing events, gaming tournaments, cycling, running and walking challenges, to name but a few. We are most proud of their efforts. In 2022, 146 awards were made under the Matched Giving Scheme, totalling £54,081 for local charities.

The success of the above programmes and initiatives during the year, is the result of the continuing dedication and hard work of the Officers of the Foundation. We would like to express our great appreciation of their efforts. Our thanks also go to all of our invaluable Trustees, who give unstintingly of their time and expertise to ensure that we maintain good governance standards, meet our objectives successfully, and also operate as efficiently and effectively as possible. This year, we welcomed one new Trustee – Rebecca Hume who is already having an extremely positive impact on the Foundation. Our thanks also go to our outgoing Chair, Paula Leathem for her wise counsel over the past nine years serving as a Trustee, as well as to Dionne Darragh and Ken Simpson who stepped down recently.

Sincere thanks go to our patron Jim McCooe, who served as a Trustee of the Foundation from 2010 – 2019 and became our patron in 2022. Jim supported the Foundation in building a strong relationship with the Bank and was an excellent Ambassador for the Foundation. We wish Jim every happiness as he retires from the Bank this year, and as patron.

In closing, it has been a very rewarding year for the Foundation. We believe the Foundation has created a special space for itself in the funding community in Northern Ireland. We are all too aware of the challenges facing the community and voluntary sector as they continue to face the cost of living crisis, as well as the impact of the lack of a functioning executive. We aim to be bold in tackling sector issues and searching for innovative ways to alleviate disadvantage and disability in all their aspects.



Mrs Gillian Boyd
Chair

Mrs Brenda McMullan
CEO

Grants Overview

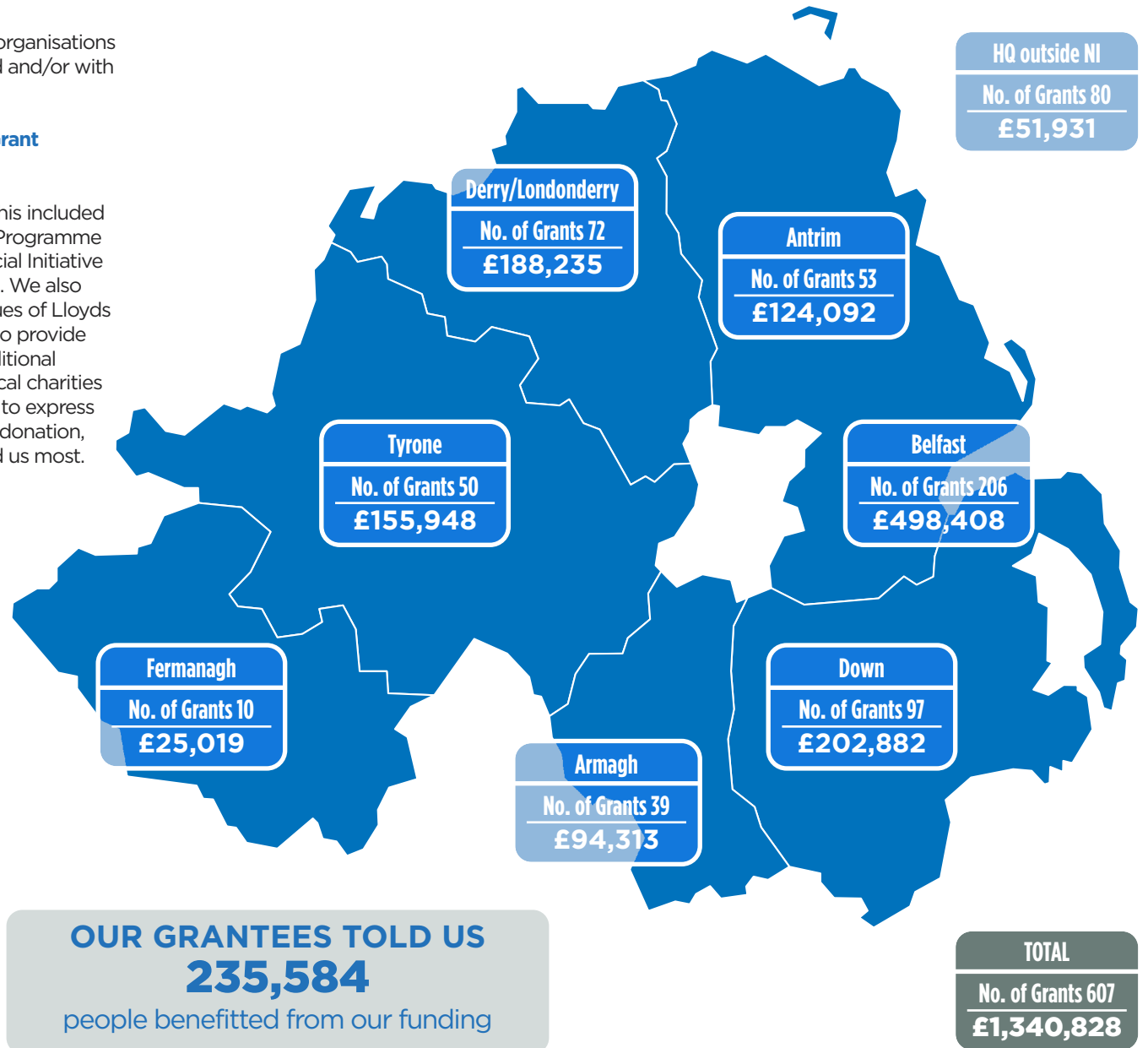
The Halifax Foundation for Northern Ireland supports charitable organisations within Northern Ireland to enable people, who are disadvantaged and/or with special needs, to participate actively in their communities

During 2022, the Foundation provided 607 grants across all Grant Programmes totalling £1,340,828.

We funded 231 organisations through our Grants Programmes. This included grants from the Community Grant Programme, the Large Grant Programme and the Special Initiatives Grant Programme. The Large and Special Initiative Grant programmes offered multi year funding to 17 organisations. We also continued to administer the Matched Giving Scheme for colleagues of Lloyds Banking Group, on behalf of the Bank. In addition, we were able to provide £500 cost of living payments to 230 grant holders due to an additional £107,000 donated from Lloyds Banking Group, to support our local charities navigating a particularly challenging environment. We would like to express our sincere gratitude to Lloyds Banking Group for this additional donation, helping us to support vulnerable communities when they needed us most.

Grant Programme Totals

COMMUNITY GRANT PROGRAMME	
Total Awarded	£922,098
Number of grants	214
LARGE GRANT PROGRAMME	
Total Awarded	£184,297
Number of grants	10
SPECIAL INITIATIVE GRANT PROGRAMME	
Total Awarded	£65,352
Number of grants	7
COST OF LIVING PAYMENTS	
Total Awarded	£115,000
Number of grants	230
MATCHED GIVING SCHEME	
Total Awarded	£54,081
Number of Approved Applications	146



Grants Overview

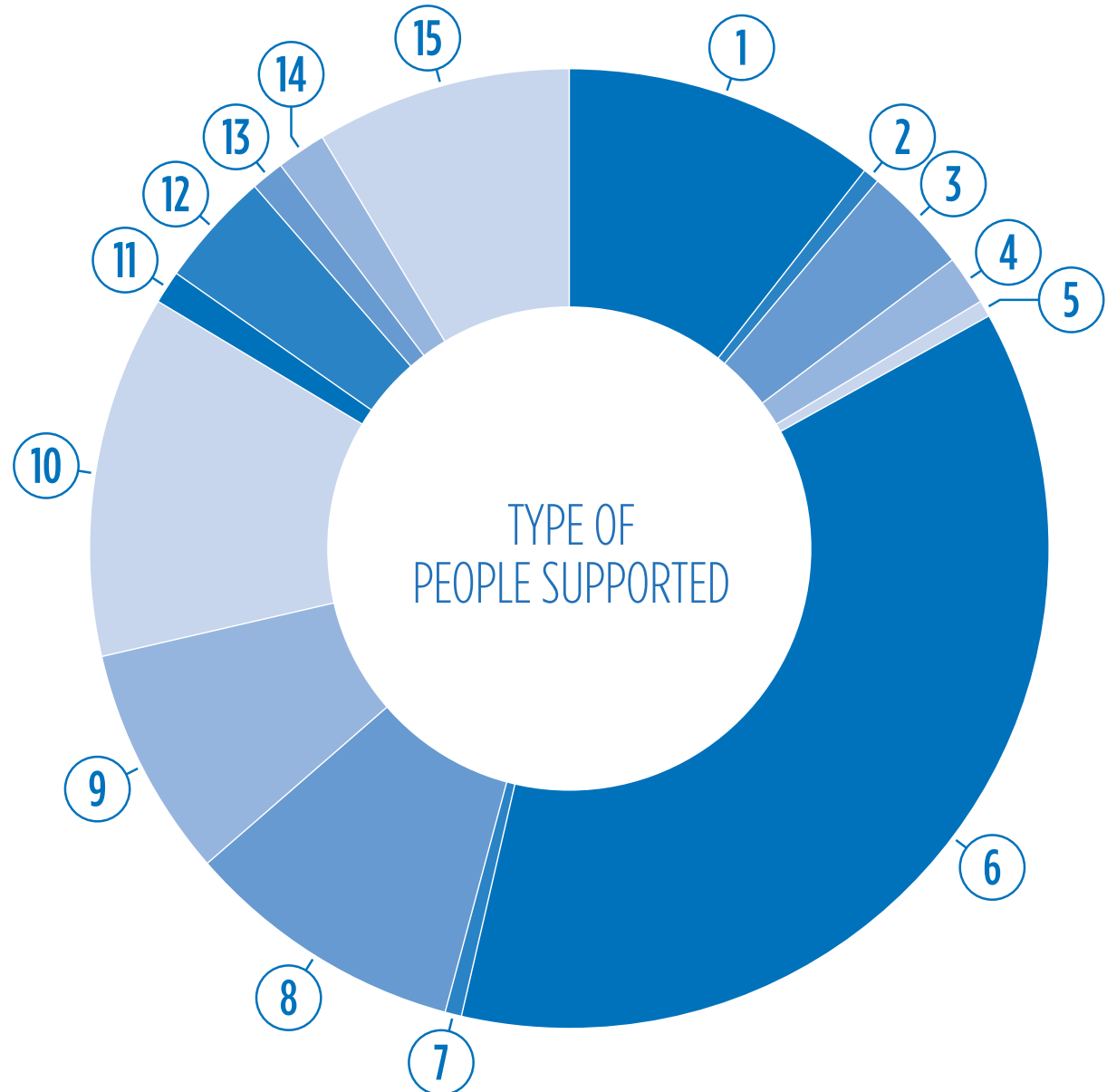
During 2022, we continued to support groups through the cost of living crisis by showing flexibility through extending grant timelines and changing budget lines.

Grants By Type of People Supported

(excluding Matched Giving)

Through our funding programmes, we support people from birth to older years, but we also support people faced with a range of different issues. The top 3 areas supported were People from a low income background (39%), People with a Physical Disability (13%) and People with mental ill health (10%).

Type of People Supported	No	Amount £
1. People with Mental Ill Health	24	137,865
2. Carers	1	3,500
3. Ethnic Minorities	7	44,723
4. Homeless	3	25,423
5. LGBTQIA+	1	4,000
6. Low Income Background	89	388,392
7. Offenders / Ex-Offenders	1	4,690
8. Other disadvantage	22	105,796
9. People with a Learning Disability	18	80,553
10. People with a Physical Disability	29	186,386
11. People with an addiction	2	9,380
12. People with an Illness	9	41,592
13. People with debt / financial problems	2	9,000
14. Victims	3	40,995
15. Young People at risk	20	89,452
TOTAL	231	1,171,747





The Birches Cosy Club

The Birches Cosy Club is a volunteer led charity which provides a weekly luncheon club, programmes & activities and social outings for those aged 50+ in the rural area of Co. Armagh. The programmes encourage active citizenship, volunteering and increasing skills within the community, providing a welcoming community space. They run mental health and wellbeing programmes and social activities which are vital to maintaining the health and independence of older people and the wider community and help to decrease social isolation and health inequalities. They have also facilitated a number of inter-generational local history projects and have a weekly art and craft class. They currently open on a Tuesday morning and have 20 weekly members.

In 2022, the group were successful in securing £3,000 towards a summer programme of activities including an outing, bus hire, and refreshments. They also requested funding for an arts and crafts tutor and materials and for a music facilitator to come to the centre each month for a sing a long and a dance.

Birches Cosy Club also availed of the digital support scheme and received a refurbished laptop for administrative purposes.

Community Grants Awarded

Organisation	Grant Amount
1st Dromore Scout Group Newry	£2,640
Active Listening	£5,500
Adoption UK	£5,000
Adopt NI	£5,000
Aghalee Village Hall	£3,000
All About Us ASD Teens	£3,500
All Set Cross Cultural Project	£3,594
Angel Eyes NI	£4,945
Antrim Enterprise Agency	£3,496
Apex Music Centre	£5,000
Ardoyne Youth Club	£4,000
Arts for All	£6,000
AUesome Kids	£4,000
Autism NI	£2,150
Ballykeel 2 & District Community Association	£3,500
Ballymena Sea Cadets	£1,848
Ballymoney Evergreen Club	£3,710
Ballyvea Football Club	£3,720
Bangor Foodbank and Community Support (BFCS)	£4,000
BeKind Kids Club	£5,000
Belfast Central Training Ltd	£6,000
Belfast City Centre Chaplaincy	£1,950
Belfast Exposed Photography	£6,000
Benbradagh Community Support	£4,000
Benedy Community Association Limited	£3,000
Beth Johnson Foundation	£4,850
Blackmountain Action Group	£3,382
Bourneview Mill Football Club	£3,467
Brassneck Theatre Company	£4,500
BraveheartsNI	£4,000
Breezemount Community Association	£3,605
Buddy Bear Trust	£10,000
Building Ballysally Together	£5,000
Cairn Lodge ABC	£6,010
Cara-Friend	£4,000
Careers N Kids	£3,800

Organisation	Grant Amount
Carleton Street Community Development Association	£2,810
Carnlough Community Association	£4,800
Carrickfergus Cornerstone	£3,380
Carrickfergus Hub Improving Lives Locally (CHILL)	£4,300
Carson Project	£4,000
Charter for Northern Ireland	£5,400
Cinemagic Ltd	£4,000
Circusful	£5,000
Clooney Estate Residents Association	£6,000
Commedia of Errors	£4,000
Community Dialogue	£3,000
Conradh na Gaeilge Boirche Íochtar/ Lower Mourne Gaelic League	£4,000
Conway Education Centre	£3,360
Craigavon and Banbridge Volunteer Bureau	£4,000
Cre8 Theatre Company	£4,700
Crossfire Trust	£4,200
Culmore Community Partnership	£3,500
Cumann Cultúrtha Mhic Reachtain	£4,960
Currynerin Community Association	£3,400
Derganagh Training and Development Association (DTDA)	£1,980
Derry Well Women	£5,000
Dervock & District Community Association	£4,125
Donacloney Football Club	£1,134
Down Community Arts	£3,364
Down District Accessible Transport	£4,000
Downpatrick Autism Family Support Group	£3,043
Drake Music Project Northern Ireland	£7,300
Dromore Childcare Centre	£5,000
Dumbworld Ltd	£4,400
Dungiven Regeneration Club	£6,000
Dunlewey Addiction Services Limited	£6,000
EastSide Arts	£4,080
Edenvilla Ltd	£4,000
Enagh Youth Forum	£4,000
Enda Dolan Foundation	£4,230
Erne Paddlers	£5,500

Community Grants Awarded

Organisation	Grant Amount
Family Care Adoption Services	£5,000
Family Routes	£6,000
Feeny Community Association	£4,000
Fermanagh Rural Community Initiative	£3,685
Fighting Words Northern Ireland	£5,000
Fóram na Óg	£4,600
Forthspring Inter Community Group	£4,000
Friends of Edenderry	£4,000
Friends of St Gerard's	£3,802
Glenariff Improvement Group	£3,990
Glenavon FC Academy	£3,890
Glencolin Residents Association	£5,000
Glengormley Amateur Boxing Club	£1,340
Glenshane Community Development Limited	£3,200
Glentoran Social Partnership	£3,060
Glór Uachtar Tíre	£5,000
Golden Thread Gallery	£6,000
Good Morning Down	£10,000
Grace Women's Development Limited	£7,337
Grow NI	£3,836
Hanwood Trust Company Ltd	£5,000
Happy Days Playgroup	£4,000
Happy Days Playgroup	£4,000
Harbour Bears Pre-School	£3,661
Harryville Mens Shed	£2,357
Head Injury Support Ltd	£4,717
Helping Hands Autism Support Group	£4,000
Holy Trinity Youth Centre	£6,170
Home Start Newry & Mourne	£3,964
HURT (Have your Tomorrows)	£3,900
ICare Incorporated	£6,000
Informing Choices NI (Trading as ICNI) Ltd	£6,000
Irish Street Youth and Community Association	£3,600
J29 Project	£5,000
Kids Inn After School Club	£2,200
Kilkeel Sea Cadets	£3,000

Organisation	Grant Amount
Ladies of Mourne	£3,500
Ladybird Playgroup Omagh	£3,000
Ladybirds Childcare Services	£4,000
Larne Community Care Centre	£3,500
Laurencetown, Lenaderg and Tullylish Community Association	£4,760
Leafair Community Association Ltd	£5,000
Lenadoon Community Forum	£3,000
Lilac Cancer Support	£5,000
Lisburn Downtown Centre	£3,500
Little Doves Ltd	£3,340
Little Orchids Limited	£4,964
Little Rascals Community Playgroup	£6,000
Loughshore Care Partnership	£3,912
Magilligan Community Association	£5,000
Maiden City Soccer Academy	£6,000
MHS Heritage & Culture Ltd	£3,929
Mid and East Antrim Agewell Partnership	£4,143
Mid Ulster Community Services Ltd	£3,844
Mid Ulster Volunteer Centre	£3,500
Mornington Community Project	£5,000
Mount Merrion Church	£3,500
Naíscoil na Deirge	£3,770
Neighbours United	£3,000
Newcastle Football Club	£3,720
Newhill Football Club	£3,005
New Horizons Partnership Ltd	£7,500
Newpin NI	£4,874
Newry Street Unite	£5,222
NICMA The Childminding Association	£4,058
O4O Cookstown Ltd	£5,500
Obon On The Foyle	£2,500
Omagh Futsal Association	£3,996
Our Social Space Ltd	£3,300
Parenting NI	£4,991
Patrician Youth Centre	£4,800
Place to Wonder	£4,000

Community Grants Awarded

Organisation	Grant Amount
Pomeroy Resource Ltd	£4,040
Portadown 2000	£5,000
Portadown Heritage Tours	£3,470
Portadown Wellness Centre	£4,500
Portrush Heritage Group	£2,500
Portrush Sea Cadet Unit	£3,000
Prime Cut Productions	£4,000
RAMS NI	£5,000
React	£6,000
Redeeming Our Communities	£5,000
Replay Productions Ltd	£8,000
Richhill Amalgamated Football Club	£4,985
Roe Valley Enterprises Ltd	£5,338
Science Festivals NI	£5,200
Shelter NI	£5,000
Shopmobility Ballymena Limited	£10,000
Shopmobility Enniskillen	£10,000
Shopmobility Lisburn	£4,576
Shopmobility Omagh	£2,688
Short Strand Community Forum	£5,000
Sion Mills Community Association	£3,450
Skainos Limited	£4,000
Sliabh Beagh Arts	£3,030
Slieve Croob Community First Responders	£5,100
Slieve Gallion Community Pre-School	£3,578
Sole Purpose Productions	£4,000
South Antrim Community Transport	£3,000
Special Educational Needs Advice Centre (SENAC)	£6,000
Springfield Charitable Association	£5,000
St Mary's PTA Banbridge	£3,000
Stand To	£2,100
Starling Collective	£5,984
St Brigid's Women's Group (SBWG)	£3,500
St Colmcilles Primary School PTA	£4,870
St Oliver Plunkett Pre-School	£3,750
St Paul's ABC	£3,600

Organisation	Grant Amount
Strand Arts Centre	£4,000
St Teresa's Youth Centre	£4,998
Superstars Club	£4,000
Target Ovarian Cancer	£4,000
Theatre and Dance NI	£4,336
The Birches Cosy Club	£3,000
The Church Army	£4,000
The Drummond Centre Project Ltd	£3,340
The Glens Community Association	£3,150
The Koram Centre, Counselling, Psychotherapy And Psycho Social Support Ltd	£5,000
The Open Door Centre	£3,758
The Plum Club	£3,380
The Turnaround Project	£4,690
Three Ways Community Association	£2,902
Tinderbox Theatre Company	£2,995
TinyLife	£6,000
Tinytoons Community Playgroup	£3,500
Tobin Centre (Moortown) Ltd	£3,150
Tools for Solidarity	£4,243
Twisters Gymnastics Ltd	£2,813
University of Atypical for Arts and Disability	£4,825
Valley Rangers Youth Football Club	£3,440
Via Wings	£5,330
Vineyard Compassion	£4,114
We Are Made For More	£4,000
We Are Ports	£4,460
West Wellbeing Suicide Prevention	£4,000
WheelWorks	£4,195
Whiterock Creche Association Limited Trading As Whiterock Childrens Centre	£4,800
Willowfield Parish Community Association	£4,000
Woodlands Preschool Centre	£1,500
Young at Art Ltd	£6,250
Young Enterprise Northern Ireland	£5,000
Zachary Geddis Break The Silence Trust	£3,600
TOTAL	£922,098

Carrickfergus Cornerstone

Carrickfergus Cornerstone is an addiction support organisation which covers Sunnylands, Greenisland and Woodburn areas of Carrickfergus. They have 32 members and they offer weekly support groups and activities that members can take part in.

In 2022, the group received funding of £3,380 towards running costs, the support group, helpline, trips and the allotment project. This group provides a lifeline to those suffering from addictions and helps to improve self esteem, the allotments improve health and wellbeing providing a structure and purpose to focus on alternative activities.

The group also availed of the digital support scheme and received a refurbished laptop.



Community Grant Programme Process

1. Pre-application Phase

The Grants Team provide pre-application calls to charities hoping to submit an application, offering advice and guidance to potential applicants.

To arrange a pre application call, please email grants@halifaxfoundationni.org or call the Foundation office on 028 9032 3000

2. Application Phase

Applications to the Community Grant Programme are made online via our website at: www.halifaxfoundationni.org

**Grant
Programmes
Online Here >**

This button will direct applicants to the 'Apply Here' button where they can take our eligibility quiz to ensure they meet the Foundations criteria.

APPLY HERE

The application form and guidance document can be accessed following completion of the eligibility quiz.

GUIDANCE NOTES

Once an application has been submitted, it is checked for completeness and eligibility.

An email will be sent to confirm the application is complete and has been passed through to assessment.

If an application is incomplete, we will give you time to submit additional information. An email is sent to request this further information with a one week return date.

3. Assessment Phase

A Grants Officer is assigned to your application. The Grants Officer will contact you by telephone or email to discuss your application further.

The Grant Officer's report is then presented to the Grants Team. The Team agrees a recommendation.

4. Decision & Post-Decision Phase

All recommendations from the Grants Team are ratified by the Board of Trustees.

Outcomes are sent to applicants following the Grants Committee Meeting.

A 'Grant Acceptance Email' is issued, together with the terms and conditions of the grant. It is important that applicants read the terms of grant carefully.

Successful applicants are required to submit their signed Terms and Conditions electronically and complete a bank

form, on receipt of which a BACS payment will be issued within 1 month.

However, if the applicants are required to meet a condition, payment will be delayed until the requirement has been satisfied.

Due to an increase in the number of Grants Committee meetings we hold each year, we have been able to reduce our decision making time for applicants from 4 months to no more than 10 weeks.

5. Evaluation (12 months later)

Grantees are required to submit an evaluation form, which is completed online.

Invoices evidencing your grant spend may be requested.

Successful applicants can re-apply to the Foundation twelve months after their grant has been awarded, provided a project evaluation has been submitted and approved.

Organisations are eligible to receive a grant for up to three years in succession if they continue to meet the eligibility criteria, before taking a two-year break.

Donacloney Football Club

Donacloney Football Club is a cross-community football club from a small rural village between the towns of Lurgan and Banbridge – supporting local villages, Dromore, Banbridge, Lurgan and surrounding areas. Currently they have two men's teams competing in the Mid Ulster Football League. In addition to this they run a number of events for the wider community, including social 7-a-side football, kids football and multi-sports programmes, kickabout football for young people, tournaments, quizzes and BBQ's. Recently they started a third men's team, the idea of this team is to keep the senior men in football, helping to keep them active and socialising together with teammates when they are no longer playing in competitive teams. They are helping to improve physical and mental health in the area and their youth team gives local teenagers the chance to represent their village.

This group received £1,134 towards football and training equipment to be able to offer these activities to both the older men's team and the youth team.

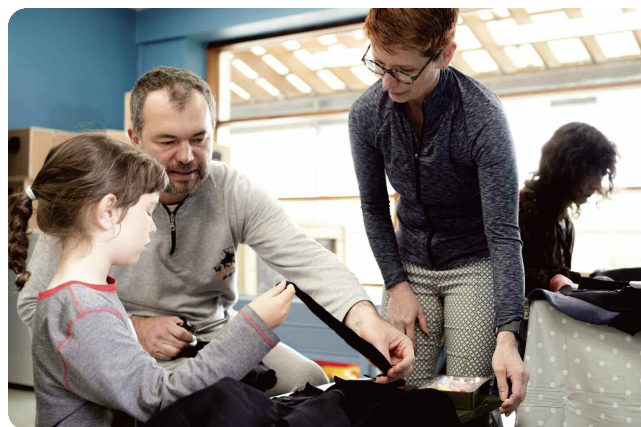


Large Grants Programme

In February 2020, a Large Grant Programme was launched in response to calls from the community and voluntary sector to provide longer term funding.

The Large Grant programme offered a maximum grant of £50,000 over a 3-year period. This programme proved very popular, with 96 applications received for consideration.

In 2022, year 2 of the programme got underway. Some projects required extensions due to knock on effects from Covid, but most were on track with their targets.



Creggan Country Park

CREGGAN COUNTRY PARK

Creggan Country Park is a shared neutral, multifunctioning green infrastructure space. Their objective is to improve the quality of life of those living in the North West including the disadvantaged Moor District. The park provides not for profit outdoor activities including inflatable assault course on water, canoeing, orienteering, team building, raft building, geocaching, angling and paintball. In addition, they provide public events during summer, Halloween and Christmas and offer an older people nature therapy programme and guided heritage tours. Volunteer training and action days for people of all ages, older people walking group and free environmental education programme for schools and colleges.

Their project, Volunteering on your Doorstep, builds on their existing environmental volunteering programme, which recruited 120 unemployed people of all ages living in areas of high deprivation as it is located in Creggan. Nature based activities have been shown to improve physical and mental health and improve team work and communication skills. The project targets people from both main traditions who are currently unemployed, have left school with little or no qualifications or are retired and have found themselves isolated from society. The project uses nature as a tool to help people build their personal development, learn new skills, build good relations and boost their confidence. Participants are put in new situations outside their comfort zones so that they will seek support from other participants and form new friendships with someone from a different age and background. By having hands on experience in the outdoor sector, it is hoped this will encourage unemployed people to enrol in further education or pursue employment in the outdoor sector and to continue to use outdoor pursuits to improve their physical and mental health.

Creggan Country Park was awarded £39,380 over 3 years to support this project.

Organisation	Awarded Amount	Project Name
Armagh Traveller Roma Support formally known as Armagh Traveller Support Group	£46,016	Roma Support
Creggan Country Park	£39,380	Volunteering on Your Doorstep
East Belfast Independent Advice Centre	£47,090	Wiser and Better Off
Eating Disorders Association (N.I.)	£44,463	Eating Disorder Support - Project worker Salary
Hands That Talk	£50,000	Hands That Talk's "All Together Project"
Invisible Traffick	£46,500	Junior Education Programme
Mid-Ulster Association for Counselling & Psychotherapy (MACP)	£49,976	Bounce Back by Reaching Out
Omagh Women's Aid	£50,000	EmpowHer
Tackling Awareness of Mental Health Issues	£49,999	Wellbeing Sat Nav
The Cithrah Foundation	£50,000	Financial Administration and Support Worker
TOTAL	£473,424	



GROW NI

Grow NI provides a safe, neutral space to support disadvantaged people to connect with each other and their wider community. They help their users to manage or recover from mental ill-health, to learn new skills, spend time in nature and build their confidence through weekly community gardening sessions. In addition, they offer wellbeing programmes such as Tai Chi and singing outdoors, community events such as the Big Lunch and other events designed to bring people together in North Belfast. The programmes target people who are marginalised for a variety of reasons; ill-health including mental ill-health, age, sexuality, ethnicity, newcomers to the area, disability groups and work with organisations supporting refugees & asylum seekers.

This group received £3,836 towards facilitator costs, materials, refreshments, travel expenses and training for a 6 week workshop for families impacted by the asylum system or who have refugee status, and 12 nature based workshops for members from across West & North Belfast.

Grow NI also benefited from receiving a refurbished laptop through our Digital Support Scheme.

Special Initiatives Grant Programme

Similar to the Large Grants Programme, a Special Initiatives Grant Programme was also launched in February 2020.

The purpose of the Special Initiatives Programme was to support projects which were more strategic in nature with a Northern Ireland wide reach. This plugged a gap that existed for infrastructure charities aiming to support the community and voluntary sector as a whole.

The Special Initiative Grant programme offered a maximum grant of £20,000 over a 2-year period.

7 organisations successfully secured a 2-year grant through this programme.

In 2022, the 7 successful organisations continued with year 2 of their planned projects.

SPORTED FOUNDATION

The Sported Foundation champions and supports grassroots 'sport for development' activity. They are not a sports organisation, rather, they believe in the power of sport to transform communities. Their membership includes 230 community groups, youth clubs and local sport associations which use sport to achieve outcomes around education and employability, health and well-being, crime and anti-social behaviour etc.

The "Skilled" project aimed to build the capacity of volunteer leaders of grassroots community groups by developing 'Train the Trainer' packages for Sported Volunteers. This project strengthens Northern Ireland's voluntary and community sector by building capacity of the "third sector workforce". This project does so by:

- 1) increasing the number of opportunities for skilled professionals to receive training and volunteer in their community;
- 2) building the capacity of volunteer leaders within local groups.



Sported Foundation

The project focussed on increasing the capacity of Sported's own team of volunteer mentors, by recruiting new volunteers (particularly from the West) and developing bespoke 'train the trainer' programmes in key areas. Volunteers' mentoring and support skills were developed, and professionals had more opportunity to utilise their skills and expertise across the 3rd sector. Feedback from their 230 members suggested that they are worried about fundraising in the face of a cost-of-living crisis, they have concerns that families will have reduced income meaning they can't afford to pay the membership fees. This programme has allowed these grassroots organisations to be matched with a volunteer mentor has been able to train them on how to diversify their income stream or provide whatever other support need which has been identified.

This project builds the group's capacity to support themselves. This training package will leave a legacy of support within NI and perhaps will be utilised in the UK at some point as well.

Sported Foundation received £16,847 over a 2 year period to deliver the 'Skilled' Project.

Organisation	Awarded Amount	Project Name
CO3	£18,400	Leading Through Coaching. The Change Makers.
NICVA	£19,950	The 'Finance Made Easy' project
Northern Ireland Sports Forum	£19,942	Code of Good Governance Development
Rural Community Network NI	£20,000	Re-ignite. Community to community learning
Sported Foundation	£16,847	SKILLED - Upskilling volunteers working at local level across the 3rd sector
Volunteer Now	£17,350	Volunteering Support
Will to Give	£16,060	Future Kindness - Gifts in Wills in Northern Ireland
TOTAL	£128,549	



Place To Wonder

Place to Wonder is a children's theatre company, using theatre and storytelling to encourage mindfulness and promote emotional wellbeing in young people and their families. During Covid, their "Dream a Little Dream" children's relaxation book and programme was rolled out across disadvantaged areas of Belfast with the support of our Halifax Covid Grant fund, to support over 100 families from areas of high deprivation. In 2021, they also won the Arts and Business Mental Health and Wellbeing Award for their innovative approach to using the arts to promote wellbeing for children.

They were awarded a £4,000 grant in June 2022 towards a 4 month storytelling programme, working in partnership with South Belfast Sure Start to support over 100 families with children aged 2-3 years. This age group was selected as research has shown that this group have missed out the most developmentally and socially due to covid lockdowns. Each family received an outdoor play workshop in their local park using storytelling to translate mindfulness tools in an early years language in order to promote wellbeing, connection and speech/language development. They then adapted the tools from the workshop into an early years children's relaxation book called "Sweet Dreams" which was disseminated in a final storytelling workshop. Parents were able to take the resources home, empowering them to use the tools in their day to day lives with their children.

Place to Wonder also benefited from receiving a refurbished laptop through our Digital Support Scheme.

Matched Giving in 2022

The Matched Giving Scheme was established to encourage members of staff of Lloyds Banking Group to get involved in the voluntary sector, to help fundraise through personal participation in events, or give their time freely to support the work of charities throughout the UK. All four Foundations run this Scheme for the staff of Lloyds Banking Group and its subsidiary companies and our own staff and Trustees.

Every member of staff employed by Lloyds Banking Group is entitled to claim up to £1,000 in each calendar year from the Matched Giving Scheme. This can be for a charity for which they have either raised money for or given their own time to volunteer. The scheme will match every pound raised or donated, including £10 per hour of voluntary time given, to a maximum of £500 for fundraising events and/or £500 for voluntary time given.

2022 continued to be a challenging year for fundraising. With many Lloyds Bank colleagues still working from home for the majority of 2022, there were fewer opportunities for team based/workplace based fundraisers. Despite this, colleagues of Lloyds Banking Group got creative!

They held tabletop gaming sessions, threw wet sponges at their Managers, and completed sponsored walks across Northern Ireland to ensure they continued to support charities supporting issues close to their hearts. Their efforts during this time provided unrestricted donations to charities when they faced the after effects of a pandemic including a cost of living crisis. We are very proud of their achievements throughout 2022.

Charity of the Year 2022 – Mental Health UK - MindWise

Lloyds Banking Group colleagues voted to support Mental Health UK (known as MindWise in Northern Ireland) as its charity partner for 2022. The partnership aims to promote awareness of the link between mental health and money problems, encourage discussion between customers and colleagues and raise at least £2 million per year in offices

and branches across the UK.

This support has been exceeded thanks to their brilliant efforts. As a result, Mental Health UK has been able to create Mental Health and Money Advice; the UK's first dedicated advice service for mental health and money problems. This service offers combined support for people with mental illness who are struggling with their money, as well as people whose money problems are affecting their mental health.

Colleagues were also able to support a young people's programme - Bloom. Bloom is a UK-wide programme which supports young people's mental health resilience. Delivered in schools and colleges, Bloom equips young people with the tools and knowledge to maintain their mental health through life's transitions, both now and in the future.

For more information on the work of Mindwise in Northern Ireland, please visit www.mindwisenv.org

Charity of the Year in Northern Ireland

Mental Health UK (MINDWISE)

Total Approved Applications	17
Total Awarded	£5,657

Overall Matched Giving in Northern Ireland

Total Approved Applications	146
Total Awarded	£54,081

The overall financial benefit to charities was £119,120, including £54,081 raised directly through the Matched Giving programme in Northern Ireland.

Many colleagues supported charities close to their hearts. In 2022 these included:

- St John's Ambulance
- Carers NI
- Marie Curie Hospice
- Angel Wishes
- Council for the Homeless
- Wildfowl and Wetlands Trust

Fundraising activities included:

- Carwash
- Tea and Coffee Mornings
- Pub Quizzes
- Sponsored Abseiling down the Europa Hotel

Volunteering activities included:

- Dog Walking
- Scout Leader
- Delivering food to foodbanks

115 employees received Matched Giving

67 charities received a payment



Fundraiser by Lloyds Banking Group Colleagues to support Guide Dogs for the Blind

Obon On The Foyle

Obon On The Foyle is a Japanese arts charity based in Derry/Londonderry and is instrumental in the development of Japanese arts in Northern Ireland. It was developed to reduce isolation, build connections & social inclusion, improve mental and physical health, tackle racism and inclusion, improve good relations between communities and increase opportunities to experience and celebrate diversity. The aim of the charity is to increase public knowledge of the Japanese community living in Northern Ireland, to create a new intercultural shared space for all traditions, and support Japanese and local artists and facilitators.

Each year they organise a festival at the Playtrail, a large, beautiful, outdoor space, which is transformed into 'Little Tokyo'. There are taiko performances, Japanese storytelling, tea ceremony demonstrations, Japanese dance and Bon Odori dance performances. It is an opportunity for those groups in the community who have been learning taiko and dance to perform on stage and show everyone their achievements. Around the site there are opportunities to try traditional Japanese games, origami, calligraphy and sample delicious Japanese food. The festival ends as the sun sets with a beautiful display of lanterns, decorated by the community.

The group received £2,500 towards the costs of the professional musicians, whose participation enhances the overall experience of those attending the festival, making it a day to remember.

Obon on the Foyle also benefited from receiving a refurbished tablet through our Digital Support Scheme.



Partnership Working with Lloyds Banking Group

Halifax Foundation for Northern Ireland is primarily a grant-maker. However, due to unique and strong relationship with our sole donor Lloyds Banking Group, the Foundation have been able to offer a package of support to our grantees beyond financial.

We are very proud to have worked alongside Lloyds Banking Group again this year on a number of different initiatives aiming at strengthening good governance and operations of small charities.

Charity Mentoring Programme

2022 saw the continuation of the Charity Mentoring programme, matching senior Lloyds Banking Group colleagues with grantees of the Foundation, to help develop the skills of leaders in the third sector.

The programme aims to provide a developmental partnership through which the Mentor shares knowledge, skills, supports, challenges and offers perspective to foster the personal and professional growth of the Mentee, in turn helping to support the objectives of the Charity. It is a partnership based on trust and respect. Through building a development-focused relationship, the Mentor and Mentee explore issues together and this will result in new learning for both parties.



Mentoring Face to Face session, Clifton House

The Mentors were drawn from a wide range of senior and experienced Lloyds Banking Group/Halifax professionals who all gifted their time to this programme.

The benefits of mentoring are reciprocal and that through mentoring the Mentors often report; stronger communication, relationship, leadership and coaching skills and affirmation of their own value and worth. But most of all they report the enormous sense of satisfaction and reward of helping another professional on their career journey.

45 Matches to date

In 2022, 12 mentoring relationships continued. Mentoring was offered as part of their package of support as well as an accreditation in Mentoring which was delivered by our partners in Advance Coaching. Huge thanks for all the support they have provided to both our mentors and mentees so far in this programme.

FEEDBACK FROM PARTICIPANTS

"The mentoring programme has been invaluable in providing me with a safe space to reflect on a range of challenges outside of 'day-to-day delivery'. My mentor has focused on my personal development – challenging and encouraging me to consider my skillset, how to enhance this and how to effectively influence others. I believe the space for reflection and gentle guidance around my skillset has enhanced my ways of working and led to me making better, more effective decisions for the organisation".
Judith Rankin, Sported Foundation NI.

Skills Exchange Programme

A Skills Exchange pairs a charity with a small team of Lloyds Bank colleagues. The Support Team use its skills, knowledge, and insights to help charities tackle a thorny problem or realise an untapped opportunity.

They receive dedicated support over a 6-month period from their Support Team; typically, via several virtual support sessions with contact in between. Together they agree how best to apply the support. For example:

- Informal discussions with representatives from the charity (CEO, staff, trustees)
- Workshops to deliver information and guidance and facilitate discussion
- Reviewing existing documents, e.g. strategies, policies, business plan, communications
- Action planning sessions
- Hands on training
- Content building sessions, e.g. populating a business plan template together
- Supplying tools and templates

5 charities availed of the Skills Exchange Programme to date

Partnership Working with Lloyds Banking Group

Charity Response Forum

A Charity Response Forum offers a space for a broad and wide-ranging discussion about the issues charities are tackling with a small team of staff drawn from across Lloyds Banking Group. The forum members apply their various skills, experience, insights, and perspectives to help grantees think through issues, test their thinking, and generate ideas. Lloyds colleagues' skills aren't limited to finance; they bring a range of experience including risk management, project management, digital, leadership, managing teams and communications.

FEEDBACK FROM PARTICIPANTS

"The forum was great and really constructive. Chewing over the priorities and services of our charity was extremely useful and I'll be sending this pack on to the board to help take forward the conversation".

"I found the forum really helpful and it made me feel valued and excited going forward. There is light at the end of the tunnel but it might just take a while to reach it".

16 charities have availed of the Charity Response Forum to date



Mentoring Face to Face session, Clifton House

Slieve Croob Community First Responders

Slieve Croob Community First Responders are a newly established charity, set up in 2022. They are volunteer led and provide support to the Northern Ireland Ambulance Service when they require assistance to local emergency calls. This group provides lifesaving first aid to people in rural areas of Mourne before an ambulance arrives. When a patient rings 999 the ambulance services contacts them and their volunteers will attend the scene, two will work on the patient and whilst one stays with the family member. When the ambulance arrives and takes over, volunteers provide a update report to the attending paramedics.

This organisation received a grant of £5,100 in May 2022 to purchase 3 defibrillators and first aid equipment.

Slieve Croob Community First Responders also benefited from receiving a refurbished laptop through our Digital Support Scheme.



Trustees of the Halifax Foundation for Northern Ireland

Gillian Boyd – Chair from March 2023

Gillian Boyd is the Service Manager for Cedar Foundation Youth Matters Service, a regional service for young people with physical disabilities, acquired brain injury and Autism. Gillian has worked in the community and voluntary sector for over 20 years specialising in Inclusion and Diversity, Fundraising, Detached Youth Work and Community Relations. Gillian has previously served on the board of Northern Ireland Children's Enterprise (NICE) and served as Chairperson with Families Achieving Change Together (FACT) a cross-community victims and survivors charity. Gillian has a MSc Autism from Queens University, Postgraduate Certificate in Executive Leadership and BSc (Hons) Youth and Community Work from Ulster University, CMI Level 7 Certificate in Leadership & Strategic Management and ILM Level 5 Certificate in Coaching & Mentoring.

Brenda Kelly – Deputy Chair

Brenda is a freelance Third Sector Consultant. She has over 30 years' experience of working in both the voluntary and community sector and public sector in England and Northern Ireland. She has held a number of roles including CEO. Brenda is passionate about supporting local communities and groups to build their skills, ensuring that they are able to serve future generations. Throughout her career she has worked to develop and support disadvantaged groups and communities. She has extensive experience of developing and implementing strategies to support the development of organisations and over the course of 30 years, she has developed and delivered a range of training for voluntary and community groups in areas such as governance, planning and volunteer support.

Aidan Bennett

Aidan is a Digital Data and Transformation Director with broad experience across a number of international verticals including Healthcare, Commercial Banking and Utilities. An IOD qualified Director, he served 7 years on the board of USEL as Chair of their Audit and Risk Committee, by

Ministerial appointment, and more recently he has spent 7 years on the board of RelateNI where he took on the role of Chair for a 3 year period during which he was named the Co3 Trustee of the year.

Barry Connolly

Barry Connolly is a Chartered Accountant with 20 years' experience. He trained with KPMG in Belfast, before working with PwC for several years. He is currently Group Finance Director with Community Finance Ireland who provide social finance lending to charities, social enterprises, and third sector organisations across the island of Ireland. Barry is a native of County Fermanagh but has been living in Belfast for a number of years. Barry is also the Chair of Victim Support Northern Ireland.

Jenny Ebbage

Jenny Ebbage has been a solicitor for over 32 years. She is a consultant in charity law. Jenny specialises in advising third sector organisations and is ranked by Chambers UK as a "Senior Statesperson" in charity law in Northern Ireland. She advises a wide range of charities from local community groups to international brands. A graduate of the University of Wales, Cardiff and Queens University Belfast, she is a trustee of several charities and a Member of the UK Charity Law Association. Jenny is a contributor on Northern Ireland charity law to a number of publications and is the NI Editor of Jordan's Charities Administration Service and a writer for PLC Global Charity Law. She delivers board training and seminars for the third sector on charity law and social enterprises and is a contributor to "The Informed Trustee" online charity trustee training platform. Jenny is the Chair of the Foundation's HR, Governance and Nominations Committee.

Angela Hodkinson

Angela Hodkinson has a background in management consultancy, philanthropy and social change advocacy. She worked for Deloitte for 16 years, where she was a leader in

its public policy advisory team in Northern Ireland, before taking up the role of Programme Executive for The Atlantic Philanthropies in 2012, responsible for its Ageing People programme in NI. More recently, as an independent consultant, Angela has had roles in not for profit organisations – acting as Interim Grants Manager for the Community Foundation NI and working with Social Change Initiative to advocate for more effective public services that improve wellbeing and reduce social inequalities. Angela completed the Boardroom Apprentice programme in 2021/22 and has recently taken up a trustee role with WISPA NI, which provides women in Belfast with opportunities to take part in physical activity. Angela enjoys rock climbing, hiking and reading.

Becca Hume (appointed September 2022)

Becca is Company Director of Inclutech Ltd and TapSOS Ltd, technology companies designing products and services for public safety and digital inclusion. Prior to becoming a business owner, Becca studied at Ulster University and holds a Masters in Multidisciplinary Design. During 2022 Becca was selected as one of MIT's 35 under 35 and received Ulster University's Convocation Postgraduate Student of the Year Award as she continued her studies in Executive Leadership. Becca's passions are rooted in the Deaf community, she is a BSL L6 user, and is currently studying to achieve Trainee Interpreter status. Communication, user interaction and design are not only her professional but personal interests along with running and rowing to keep fit, and spending time with family.

Áine McCoy

Áine is the People Partner for Lloyds Banking Group in NI, she has held this role since 2003 and prior to this, worked with in both the Private and Public Sector in HR. She is a Chartered member of the Institute of Personnel and Development and a Graduate of the University of Ulster.

Trustees of the Halifax Foundation for Northern Ireland

Niall Parfitt

Niall Parfitt is a marketing professional with over 20 years of experience working with large organisations to SMEs. Niall also holds an MSc in Organisation and Management from Queen's University, Belfast and a professional diploma from the Chartered Institute of Marketing (CIM). He is also a Fellow of the Chartered Institute of Marketing. Niall runs his own inbound marketing agency, Atlanticus Digital. Niall also facilitates workshops and webinars across all of Ireland training on all aspects of digital marketing. Niall is currently a Trustee/Director of Headliners and was on the board of the South Eastern Regional College (SERC) as part of the Boardroom Apprentice programme in 2020. On a personal level, Niall is deeply passionate about giving back and has fundraised for a number of charities such as Children's Heartbeat Trust, Down's Syndrome Association and Alzheimer's Society of Ireland. In the last 3 years, he has completed 6 marathons including Dublin, Belfast and Derry. Niall lives in Banbridge and is married with two children.

Michael Prendergast

Michael Prendergast is a Senior Fraud Manager with Lloyds Banking Group where he has worked since 2005. Prior to this he has held a number of technical roles in the Private Sector both in Ireland and abroad. Michael is a graduate of the Galway Mayo Institute of Technology and is married with two teenage children. He is an active school governor since 2004 and Third Sector mentor.

Melvin Slaine

Melvin has worked for Lloyds Banking Group since 1994. He leads the Blackhorse Distribution Team in Northern Ireland. Responsible for P&L, Risk, Compliance and Sales Objectives via intermediary relationships. Melvin worked with the Halifax Foundation in 2017 to set up phase one of the mentor programme – which matched colleagues to charities funded by the Foundation to provide mentoring to a key member of staff. He was also instrumental in supporting the Foundation to set up Financial Literacy training for charities.

Dionne Darragh (resigned May 2023)

Dionne Darragh graduated from the University of Ulster, Jordanstown in 2006 and has practiced as a Solicitor since 2008, following graduation from the Institute of Professional Legal Studies. Dionne is a Director in O'Reilly Stewart Solicitors, specialising in personal injury litigation, with particular expertise in catastrophic injury, amputation and severe fracture cases. She advises clients on a wide range of complex clinical negligence actions involving misdiagnosis, delayed cancer diagnosis, birth injury and surgical negligence claims. Dionne is a member of the Belfast Solicitors Association and the Law Society Clinical Negligence Practitioners Group. In her spare time, Dionne enjoys nothing more than heading out with her husband on their motorbikes. She is a road captain for the Belfast Chapter Harley Owners Group, and helps organise rallies, ride outs and events.

Paula Leathem – Chair (resigned June 2022)

Paula Leathem is the Senior HR Business Partner for Northern Ireland Electricity Networks. Having worked in the organisation for over 34 years she has held a number of positions within the Customer Services area before moving into the HR team in 2003. A key member of the Senior Leadership team Paula leads on a number of the company's key strategic HR initiatives which includes diversity, engagement, organisational development and change. Paula joined the Halifax Foundation board in 2013 and acted as Deputy Chair before taking over the chair position in 2021. She is a Chartered member of the Chartered Institute Personnel and Development. As a University of Ulster graduate she also has successfully completed a Coaching & Mentoring Certificate at Queens University Belfast and an Institute of Leadership and Management (ILM) Level 5 Certificate in Leadership & Management. She also recently joined the Women in Business board. Paula lives in Carrickfergus and is married with 4 children and 3 grandchildren.

Ken Simpson (resigned May 2023)

Ken Simpson is an accountant and for over 40 years worked in the media sector, 35 of which were as Finance Director of Belfast Telegraph Newspapers. In addition, he has a degree in Economics (Hons) from Queens University and an MBA (distinction) from the University of Ulster. In 2010 Ken moved to the voluntary sector and has held various finance roles with several leading Northern Ireland charities, including Young Enterprise, RNIB and the Red Cross. He is also a Trustee of a number of well known charities, as well as being a Trustee Director of a large pension fund. Ken's main skills and experience are in the areas of finance, governance, risk management, change management, strategy development, operational planning, board and committee meetings and procedures, and grant application, monitoring and control.

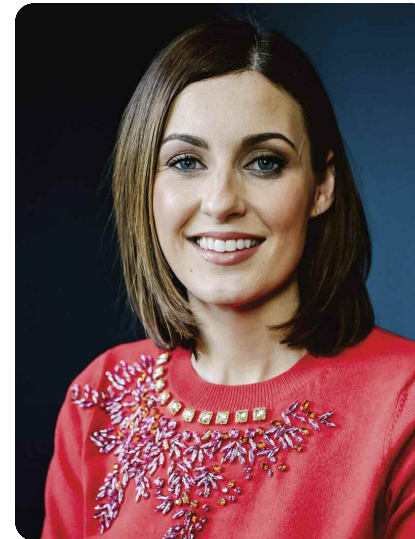
Halifax Foundation for Northern Ireland Team

The Foundation staff team consists of the Chief Executive Officer, the Grants Manager, three Grants Officers and an Administrative Officer. Our small team share over 80 years' experience of grant making, and work tirelessly to support the Community and Voluntary Sector, reflecting the organisational culture of nurturing small, grassroots charities through grant application and management.

The team continued to support organisations seeking funding as they faced a new challenge with the introduction of the cost-of-living crisis. Many charitable organisations faced exorbitant increases in their utility bills, after 2 years of struggling to maintain a presence throughout Covid. We were incredibly grateful to Lloyds Banking Group who, on recognising this significant challenge, provided the Foundation with an additional £107,000 in funding to provide £500 one off cost-of-living payments to all 2022 grant holders. This was a much-needed boost to the community and voluntary sector at a time of unprecedented struggle.



Brenda McMullan, CEO



Joanne Byrne, Grants Manager



Niall Corry, Grants Officer



Caroline Fulton, Grants Officer



Debbie Taylor, Grants Officer



Callum McCartney Admin Officer



Strand Arts Centre

Strand Arts Centre are an arts charity based in the old Strand Cinema in East Belfast. They provide film screenings, arts events and activities to 60,000 people per year. They host weekly activities in drama, dance, music, film, craft workshops and film screenings for seniors that are dementia friendly.

They received a grant of £4,000 in October 2022 towards a “Silver Screenings” programme of dementia friendly film screenings which allows older people to stay physically and mentally active, coming together to enjoy social experiences which will address loneliness within nursing home settings. Sessions are open to retired people, nursing homes, supported housing and social groups such as men’s shed, University of Third Age and Engage with Age. Through this grant they were able to provide 24 dementia friendly screenings, 7 screenings of additional arts performances, 2 screenings which will talk about the history of cinema and 1 showcase event.

Statement of Financial Activities (incorporating income & expenditure account)

Year ended 31 December 2022

	Unrestricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Incoming resources			
Donations	1,375,206	1,375,206	1,529,088
Grants returned	23,044	23,044	5,655
Investment	70,037	70,037	60,794
Total incoming / net income	1,468,286	1,468,286	1,595,537
Expenditure on			
Charitable activities			
- Education and training	455,206	455,206	353,519
- Social and community welfare	1,155,939	1,155,939	883,036
- Matched Giving	66,018	66,018	74,991
Raising Funds			
- Investment management costs	11,166	11,166	13,354
Total Expenditure	1,688,329	1,688,329	1,324,901
Net (expenditure) / income before investments (losses) / gains	(220,043)	(220,043)	270,636
Net (losses) / gains on investments	(255,531)	(255,531)	210,483
Net (expenditure) / income for the year / Net movement of funds	(475,574)	(475,574)	481,120
Reconciliation of funds			
Total funds brought forward	2,833,686	2,833,686	2,352,566
Total funds carried forward	2,358,111	2,358,111	2,833,686

There were no other recognised gains or losses other than those listed above and the net income for the year. All income and expenditure derives from continuing activities.

Balance sheet as at 31 December 2022

	2022 £	2021 £
Fixed assets		
Intangible assets	-	-
Tangible assets	2,517	4,201
Investments	1,654,857	2,056,650
Total fixed assets	1,657,374	2,060,851
Current assets		
Debtors	867	1,104
Cash at bank and in hand	957,784	1,005,025
Total current assets	958,651	1,006,129
Creditors: amounts falling due within one year	(257,914)	(233,295)
Net current assets	700,737	772,834
Net assets	2,358,111	2,833,686
The funds of the charity:		
Unrestricted general funds	2,358,111	2,833,686
Total charity funds	2,358,111	2,833,686

Trustees' Statement on Financial Summary

These financial statements of The Halifax Foundation for Northern Ireland registered number NI019019 were approved by the Board of Trustees and authorised for issue on 9th June 2023. They were signed on its behalf by:
Mrs Gillian Boyd Chair / Trustee
 09 June 2023

The full annual report and financial statements are available from the Company Secretary, of The Halifax Foundation for Northern Ireland, Clifton Heritage Centre, 2nd Floor, 2 North Queen Street, Belfast, BT15 1ES.

Halifax Foundation for Northern Ireland Registration number: NI 19019



Halifax Foundation for Northern Ireland

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Registered in Northern Ireland Number 19019
Company Limited by Guarantee
Charity Registration NIC101763

