



# GIVING BACK

## CHARITY FUNDRAISING & GRANT MAKING 2024/25

*Image: Birmingham Hippodrome  
Musicals Youth Theatre  
Vivienne Bailey Photography*

*This is an external document—please feel free to share it with anyone interested in supporting the charities we work with, or in learning more about our philanthropic efforts.*

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*Hortons' Estate Ltd is a commercial property company that has a longstanding philanthropic tradition, it is not a registered charity.*

# OVERVIEW

Our goal is to support the communities where we live and work, believing that when these communities thrive, we thrive as well. Our efforts to support good causes are delivered through staff fundraising efforts and the Hortons Social Purpose Committee's (HSPC) grant-making activities.

## **CHARITY FUNDRAISING**

Hortons staff engage in fundraising activities throughout the year, raising funds for a nominated charity which they select on an annual basis.

## **GRANT MAKING**

The HSPC was established to significantly expand the direct support we provide to local good causes through grants. Our mission is to address suffering, disadvantage, and exclusion by supporting initiatives that tackle financial hardship, advance education, and promote the arts. This year, with an increased budget, we are supporting eleven charities that address these specific areas of need, fostering meaningful and sustainable improvements in the quality of life for our community.

## **SOCIAL VALUE**

Our commitment to social responsibility resonates with our stakeholders and is reflected in our efforts to address significant community needs and support long-term development. We focus on providing compassionate and philanthropic support to further our objectives, ensuring that our contributions create sustainable and measurable impacts. Through structured frameworks, we aim to build resilience and capacity within the communities we serve. By sharing our processes and materials, we help other companies overcome hurdles related to due diligence and research. This collaborative approach amplifies the impact of corporate social responsibility efforts across the community.

# CHARITY FUNDRAISING

Hortons has a proud history of charitable fundraising, with staff selecting a charity each year and engaging in various initiatives to raise funds for the chosen cause.

Last year, Hortons staff raised over £25,000 for their charity of the year, Prevent ALL. This year's staff charity is Noah's Star, which supports families with premature or sick babies.

Previous charities supported include Ward 19 at Heartlands Hospital, Birmingham Children's Hospital, Beating Bowel Cancer, Fisher House at the Queen Elizabeth Hospital, Macmillan Cancer Support, Dementia UK, the Neonatal Unit at Birmingham Women's Hospital Charity, and Prevent ALL.



*Hortons staff hiking the Three Peaks in support of Prevent ALL.*

# CHARITY FUNDRAISING

## STAFF CHARITY OF THE YEAR 2024

In 2024, we are supporting Noah's Star, a Birmingham-based charity that provides support to families of premature and sick babies across the West Midlands.

Jo-Anne Shellum, founder of Noah's Star said: "As a small charity this will make a huge difference to the families we work with."

"Noah's Star aims to alleviate the challenges experienced by families with premature and sick children. We not only provide practical support but also emotional assistance and a sense of community, with a special emphasis on supporting the entire family, particularly siblings."



Noah's Star

# GRANT MAKING

Hortons' Estate Ltd is proud to be expanding the direct support it gives to local good causes via the Hortons Social Purpose Committee.

In 2024, we have provided grants to eleven remarkable charities that represent diverse and impactful work that we are privileged to be a part of, each aligning with at least one of our three objectives:

- To prevent or relieve financial hardship & exclusion
- To advance education of people who are in need
- To promote, maintain, improve and advance the arts

*We award grants in a single window each year (see page 15). The grant periods generally extend into 2025.*

## NEW GRANT APPLICATIONS

Please be aware that due to limited time and financial resources available, the Committee is regrettably unable to respond to any inbound enquiries relating to grant requests / new applications.



Suited For Success

# GRANTS: HARDSHIP AND EXCLUSION

## **LET'S FEED BRUM**

*Vehicle Replacement*

Give support:

[letsfeedbrum.com/get-involved/corporate-support/](https://letsfeedbrum.com/get-involved/corporate-support/)

Addressing the immediate needs of those who are homeless or at risk of homelessness, and connecting them to services for much needed support. Our grant for vehicle replacement is essential for expanding service reach to better aid local communities.

## **THE JERICHO FOUNDATION**

*Jumpstart Project*

Give support:

[jericho.org.uk/partner](https://jericho.org.uk/partner)

Stepping-stone charity that provides people who are at risk of social & financial exclusion with work & training in their social businesses. 'Jumpstart' links beneficiaries of Jericho's social businesses to sustainable employment, advancing social mobility for those facing hardship.

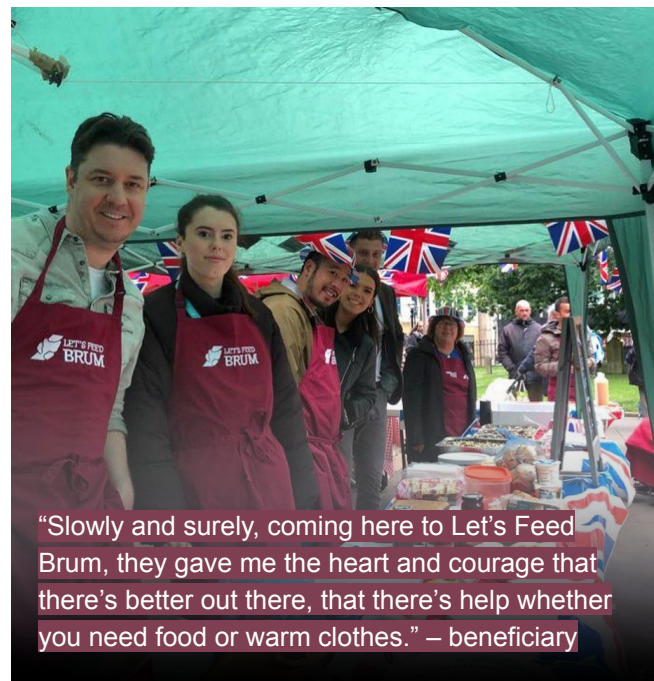
## **KARIS NEIGHBOUR SCHEME**

*Children & Families Work;  
Men's Space*

Give support:

[karisneighbourscheme.org/giving](https://karisneighbourscheme.org/giving)

CFW enhances community support for vulnerable families in Birmingham by addressing financial hardship. MS engages isolated older men with tailored activities, directly combating social exclusion and encouraging group participation and wellbeing.



*Let's Feed Brum*

# GRANTS: HARDSHIP AND EXCLUSION

## **SIFA FIRESIDE**

*Washroom Refurbishment*

Give support:

[sifafireside.co.uk/ways-to-give](https://sifafireside.co.uk/ways-to-give)

SIFA Fireside supports clients in their recovery from the effects of homelessness. Our grant is for the refurbishment of their female washroom facility, making it fully accessible and fit for purpose, and providing cleanliness, well-being, and dignity for vulnerable clients.

## **ST BASILS**

*Hardship Fund*

Give support:

[stbasils.org.uk/help-us](https://stbasils.org.uk/help-us)

St Basils is a housing association & charity. Addressing homelessness at its roots & breaking the homelessness cycle for those aged 16-25. The Hardship Fund provides essential items to young people in crisis to prevent them from spiralling into homelessness.

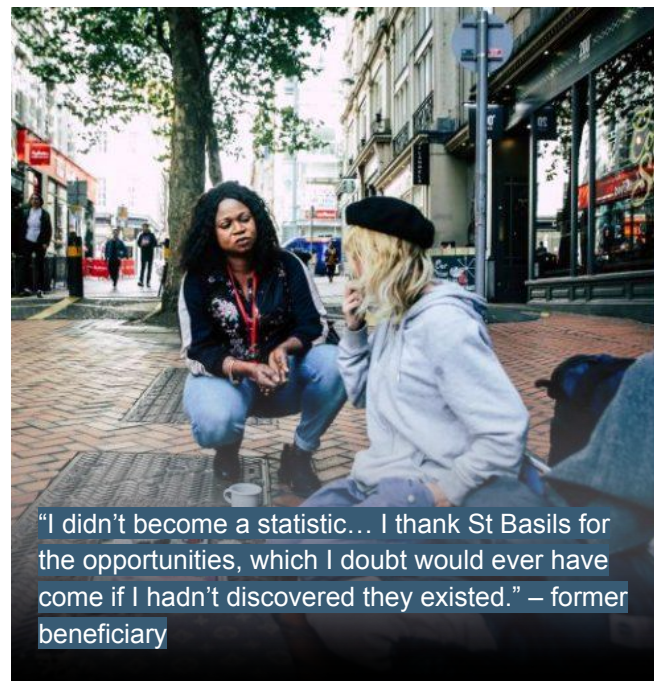
## **SUITED FOR SUCCESS**

*Engage Employment*

Give support:

[suitedforsuccess.co.uk/donate-to-us](https://suitedforsuccess.co.uk/donate-to-us)

Helping the unemployed & disadvantaged with skills and interview outfits - helping them back into employment. The Engage project offers tailored support, including personalised coaching, interview preparation, and access to professional attire to increase client employability.



*St Basils*



# GRANTS: EDUCATION

## **ELMHURST BALLET SCHOOL**

*Hortons Scholarship*

Give support:

[elmhurstballetschool.org/en/support-us/supporting-elmhurst/](https://elmhurstballetschool.org/en/support-us/supporting-elmhurst/)

Elmhurst Ballet School Trust, a world leader in ballet training and education. The Hortons Scholarship supports talented dancers from disadvantaged backgrounds, ensuring they complete their training and achieve their potential, thereby promoting social mobility in the arts.

## **BIRMINGHAM HIPPODROME**

*Hippodrome Education Network*

Give support:

[birminghamhippodrome.com/give-andjoin/](https://birminghamhippodrome.com/give-andjoin/)

HEN engages over 40,000 young people annually. Our grant supports two schools in deprived areas of our community with high-quality performing arts and cultural education, fostering academic and personal growth.

## **THE REP**

*Early Years Programme*

Give support:

[birmingham-rep.co.uk/support-us/](https://birmingham-rep.co.uk/support-us/)

Birmingham Rep Early Years Programme: a creative learning and outreach programme for pre-school children to help overcome delayed speech, language development & lack of confidence related to isolation from the pandemic.



“...sessions encouraged the children to speak, to think, to imagine, to move creatively – all fantastic for developing speech, language and communication skills” – New Life Nursery School

*The Rep*

# GRANTS: ARTS

## **B:MUSIC**

*B:and Together*

Give support:

[bmusic.co.uk/support-us](https://bmusic.co.uk/support-us)

Countering the decline in music education in state schools for Birmingham's underprivileged youth with programmes that reinforce personal and academic growth, and encourage social inclusion.

## **BIRMINGHAM ROYAL**

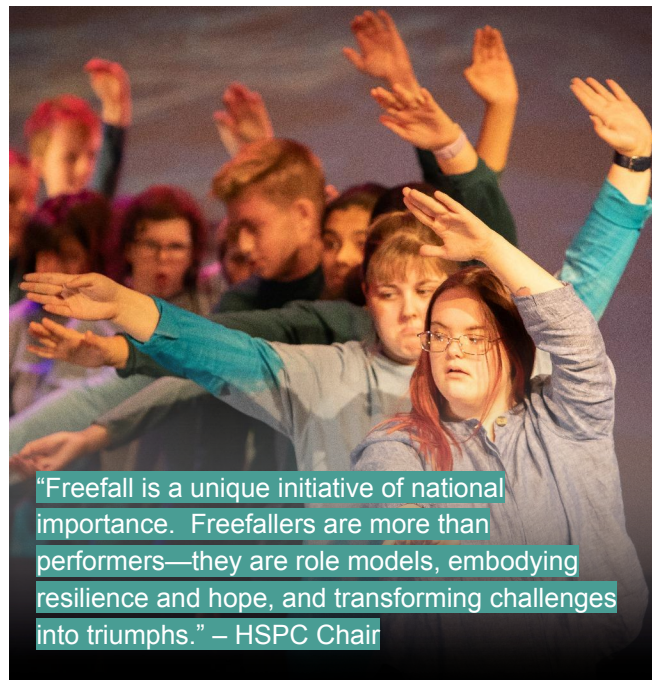
### **BALLET**

*Freefall Dance Company*

Give support:

[brb.org.uk/get-involved/freefall-dance-company](https://brb.org.uk/get-involved/freefall-dance-company)

Providing opportunities for talented dancers with severe learning disabilities to share their creativity with society, raising the aspirations of their peers, promoting inclusive teaching practices via their outreach programmes, and challenging misconceptions.



“Freefall is a unique initiative of national importance. Freefallers are more than performers—they are role models, embodying resilience and hope, and transforming challenges into triumphs.” – HSPC Chair

*Freefall Dance Company*

## EXPANDING IMPACT

### MATCHED FUNDING

We continually seek to leverage our budget by encouraging businesses and individuals to make direct donations to the charities we support, under the same terms as our grants. By partnering with those who share our commitment to social responsibility, we aim to amplify the benefits to our community through structured and effective charitable contributions.

In order to encourage other organisations to engage in charitable giving, or to help enhance their processes, we are happy to share our own proven frameworks. As such, please do feel free to share this document to any parties it may be of interest to.

### NETWORKING

We are always eager to make introductions to any of the charities that we support. If you are interested in supporting one of the initiatives outlined in this document please contact the Committee Chair via email at [hhorton@hortons.co.uk](mailto:hhorton@hortons.co.uk).



Birmingham Hippodrome Education Network  
Image: Simon Hadley Photography



## FURTHER INFORMATION

# HORTONS SOCIAL PURPOSE COMMITTEE (HSPC)

## WHAT IS THE HSPC

The grant awarding committee of Hortons' Estate Ltd: a committee of the main board set up to expand the direct support that Hortons gives to local good causes by means of grants. This builds on the long-standing objectives and obligations of Hortons to contribute to the local community and society. This year we are providing support to eleven remarkable charities that are making a difference in specific areas of need.

## THE NEED AND OUR MISSION

Within our community there is much suffering, disadvantage, stifled and unrealised talent, exclusion, isolation, and loneliness.

Our mission is to act with philanthropy and compassion to identify and support initiatives that create the conditions to: improve lives, give second chances, help overcome hurdles, support/ include and nurture lives which in turn nurtures our community.

## OUR STATED OBJECTIVES

To guide & give clarity to what we will support, we have three key objectives:

- To prevent or relieve financial hardship & exclusion [with a focus on homelessness];
- To advance education of people who are in need by reason of their youth, age, infirmity, disability or such other economic or social disadvantage with a view to improving the conditions of life of such persons; and
- To promote, maintain, improve and advance the arts to develop cultural awareness, to inspire and change lives, and promote talent.

# GRANT CRITERIA & BUDGET ALLOCATION

## OUR RECOMMENDATION CRITERIA FOR GRANTS

Aligned with our stated objectives, the criteria for recommending grants follow the guidance set out in our *Grant Making Policy* document (available upon request). This ensures that our funding priorities are met and appropriately distributed, and that the recommended grant amounts are based on merit and impact.

## ALLOCATION STRATEGY

The Committee aims for a balanced distribution of our budget that addresses immediate needs in crisis and rehabilitation while investing in long-term developmental goals through education and the arts. This approach reflects the comparative value and impact of arts and education initiatives, especially in terms of personal development, societal inclusion, and long-term benefits.

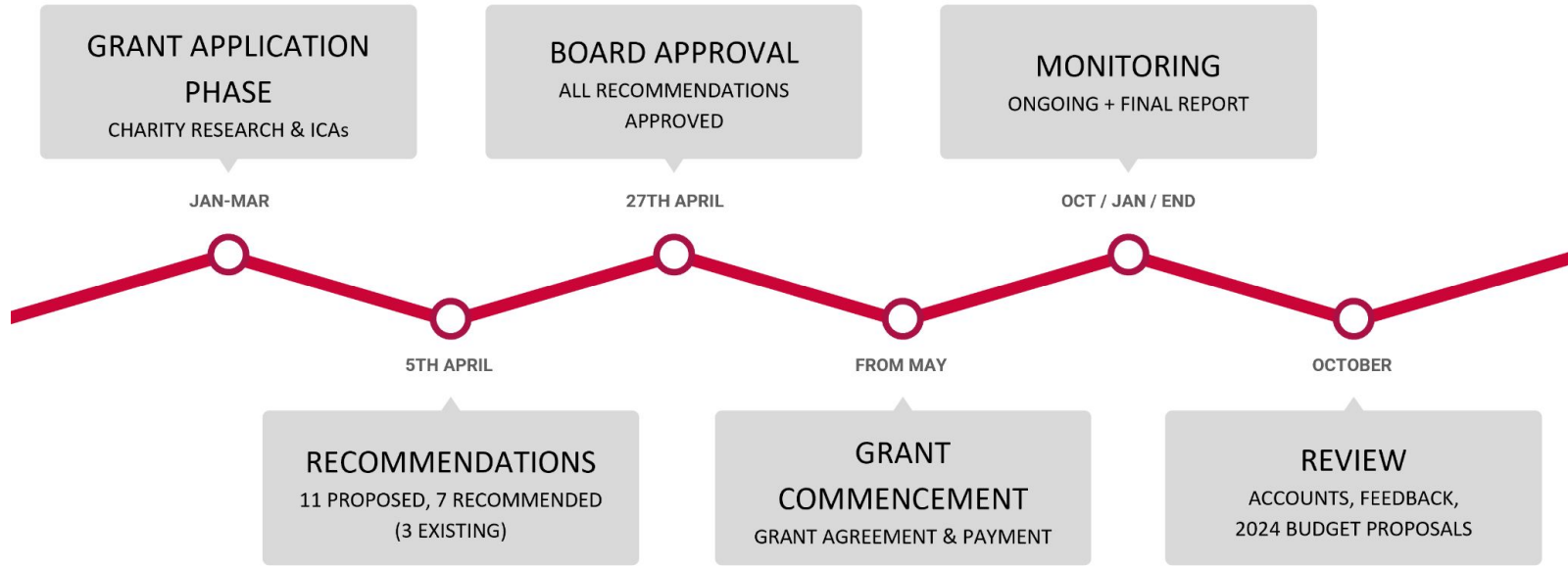
In alignment with this strategy, allocation of our budget by objective was targeted as follows:

- To prevent or relieve financial hardship & exclusion: **60%**
- To advance education of people who are in need: **20%**
- To promote, maintain, improve and advance the arts: **20%**

Each individual charity was then evaluated on a case by case basis for distributions across initiatives within each of these three categories, with a view to following the overall category percentages.

Any matched funding amounts secured by the Committee fall outside of these distribution weightings.

# THE HSPC PROCESSES



The HSPC is dedicated to implementing robust and responsible charity sector protocols, ensuring that our grant selection, due diligence, grant application guidance, and monitoring procedures are not only appropriate and proportionate but also strive to achieve outstanding quality.

# KEY GRANT DOCUMENTATION

- Grant Application
- Recommendation Note
- Grant Agreement Letter
- Interim & Final Reports

The culmination of the grant application phase results in each charity submitting an application that clearly outlines how the funded activities will benefit the intended beneficiaries and advance the funding priorities, how the grants will be managed, details of the key individual(s) responsible, a budget for the proposed activities, and any other funding awarded or sought. Applications are limited to two sides of A4, including links to accounts and other relevant information.

We then produce a recommendation note that allows our committee to evaluate the merits of each proposed grant award in a uniform format (example overleaf). Once a grant is approved, the charity agrees to the conditions of the grant via a grant agreement letter (example overleaf) before payment is made.

The committee monitors the grants, ensuring they are spent as agreed and that the designated beneficiaries receive the expected benefits. This is assisted by both an interim and final report from the charity, showing progress, summarising key achievements or problems encountered, and providing formal records such as receipts and invoices.

This diligent process helps give others the confidence to donate on matched funding terms.



# RECOMMENDATION NOTE EXAMPLE



*Engage Employment Project: directly tackles employment barriers for vulnerable groups through local business partnerships.*

## **Executive Summary & Strategic Alignment:**

Suited For Success seeks a grant of £[X] from the Hortons Social Purpose Committee (HSPC) to further develop their Engage Employment project that focuses on offering tailored support to unemployed individuals facing barriers to re-entering the workforce. These include language challenges, criminal records, and homelessness, helping to address the HSPC's objectives to alleviate financial hardship and social exclusion, and advance education through skills development.

## **Needs & Beneficiaries:**

Birmingham has the highest rate of unemployment amongst core UK cities at 11.5%, compared to the UK average of 4.6%. The Engage project is essential for providing the additional support needed to connect job seekers with meaningful employment opportunities.

## **Aims, Objectives, Programme:**

The project focuses on offering tailored support, including personalised coaching, interview preparation, and access to professional attire for interviews. By facilitating 'Insight Days' with local employers, the programme provides participants with a real-world understanding of workplace environments, encouraging confidence and visualising potential career paths.

## **Expected Impact:**

The anticipated impact includes improved employability for participants, with the programme aiming to support up to 25 clients per Engage Employment day through direct coaching and styling sessions. This approach is expected to enhance participants' confidence, skills, and ability to secure sustainable employment, thus contributing positively to their lives and the local community.

## **Management & Budget:**

Managed by the CEO [X], and finance trustee [X], the project has a detailed budget allocation focusing on staffing, volunteer costs, and other necessary expenses to ensure effective delivery. The requested grant will directly support the implementation of six Engage Employment days, directly benefiting participants and contributing to their job search success.

## **Conclusion & Support Recommendation:**

The Engage Employment project will complement our already funded bus days to help tackle unemployment within Birmingham. The requested grant of £[X] will fund six Engage Employment days to assist up to 150 people in finding employment, enabling the continuation and expansion of this impactful initiative. The grant aligns with HSPC's mission to advance education and relieve financial hardship among vulnerable populations.

# GRANT AGREEMENT LETTER EXAMPLE



Dear [X],

**Grant Agreement Terms & Conditions:** Suited For Success – Engage Employment Bus Project

**Grantor:** Hortons Estate Limited

**Grantee:** Suited For Success

**Grant Application Amount:** £[X]

**Approved Grant Amount:** £[X]

Our offer of this grant is subject to your agreement to:

1. Use the grant funds only as specified in the approved grant application unless our prior approval in writing is given for it to be used for any other purpose.
2. Grants awarded must not be given or transferred to any third party but must be used solely by the organisation it was awarded to.
3. Maintain your records to show and account for the use of grant funds.
4. Comply with reasonable requests for information about programme activities and grant expenditure.
5. Repay any portion of the funds not used for the specified purposes including any part of the grant remains unused when the activities that the grant was intended to fund have been completed.
6. Take reasonable care to ensure that the funds and the project are conducted in a proper manner and in accordance with applicable laws and relevant guidance.
7. Accept that we reserve the right to seek recovery for the whole of a grant or any unspent balance to be returned if it is found out that your organisation has provided false information or has not adhered to the terms and conditions of acceptance.
8. Accept that by providing a grant Hortons is not accepting any responsibility for the project.
9. Note that grants are awarded on an individual application basis and therefore repeat funding should not be expected or planned for.
10. Also meet terms and conditions specified in the addendum to this letter.

If your charity agrees to these terms, please have an authorised representative electronically sign and return to [X] and [X]. Be aware that unless this grant agreement is accepted, signed and returned within two months of its date, it will automatically lapse.

Yours sincerely,

[X]