



RESEARCH INTO POTENTIAL SOURCES OF FUNDING FOR THE FRIENDS OF STOCKTON & DARLINGTON RAILWAY

July 2021



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Image credits:

Front: Flying Scotsman on Skerne Bridge, © Pete Giroux

P2: The opening day of the Stockton & Darlington Railway in 1825. Painted by John Dobbin, © Darlington Borough Council

Page 5: Brusselton Incline looking west, © Friends of the S&DR

Page 8: Brusselton Incline and engine reservoir, © Mark Ingelby

Page 13: Brusselton Accommodation Bridge, © Jonathan Ratcliffe

Page 15: Volunteers working on 1825 bridge, © Friends of the S&DR

Page 17: Locomotion No 1 on display at North Road Darlington, © FSDR

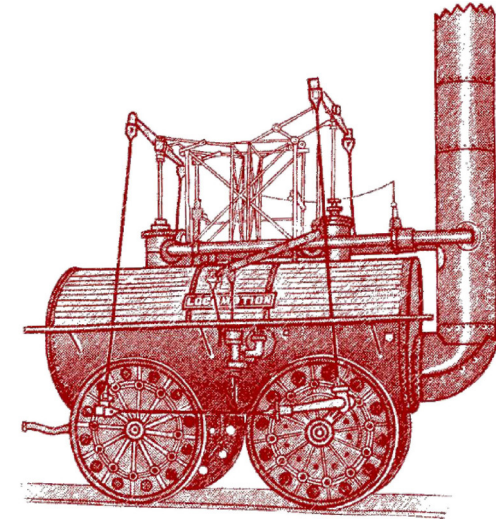
Page 19: Skerne Bridge, © SDR

1. EXECUTIVE SUMMARY

In April 2021, the Friends of Stockton and Darlington Railway (FSDR) commissioned a feasibility study by True North Fundraising which assessed potential funding opportunities for the range of projects FSDR is looking to achieve. The report made a number of recommendations regarding immediate next steps, including internal infrastructure, project prioritisation and determining potential funding which could be secured immediately from partners including local councils. FSDR subsequently commissioned Tarnside Consulting to build on this work by identifying potential sources of funding across the range of identified projects and conduct research into comparable appeals and projects either by location or by area of activity.

Tarnside's methodology has been to assess the capacity to make major gifts, the propensity to support FSDR and the recent track record of giving elsewhere. This report is based on 4 pieces of work, derived from the following sources:

- **Benchmarking research into comparable organisations and projects**
Sources: Charity Commission, annual accounts, websites
- **Trust research**
Sources: Specialist database, Charity Commission, museum publications, donor lists from other museums and similar organisations
- **Research into High Net Worth Individuals with relevant interests**
Sources: Companies House, press and media, donor lists from other museums and similar organisations
- **Research into companies with potential relevant interests**
Sources: Companies House, annual reports and accounts, websites



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2. BENCHMARKING

2.1. INCOME SOURCES

Tarnside Consulting undertook initial research to benchmark FSDR against giving to other organisations responsible for industrial heritage and/or walking trails, but found that approaches and income sources were so varied that it was impossible to compare activities in a meaningful way. The scope of the project outlined by FSDR would make it comparable in geographical spread and heritage significance to a site such as the Derwent Valley Mills World Heritage Site in Derbyshire. There is no single organisation responsible for the funding of the various sites included in Derwent Valley Mills; rather it is a complex ecosystem of funding partners, some charitable and some statutory. Many of these fundraise directly themselves, and are therefore in competition with each other for grants and donations.

Derwent Valley Mills key partners:

Amber Valley Borough Council; Arkwright Society; Arts Council England; Belper Civic Forum; Belper North Mill Trust; Darley Abbey Community Association; Darley Abbey Mills; Darley Abbey Society; Department for Culture, Media and Sport; Derby City Council; Derby Museums Trust; Derbyshire Archaeological Society; Derbyshire County Council; Derbyshire Dales District Council; Derbyshire Economic Partnership; Derbyshire Wildlife Trust; Derwent Valley Line Community Rail Partnership; Derwent Valley Trust; D2N2 Local Enterprise Partnership; East Midlands Chamber; Environment Agency; Friends of Belper River Gardens; Friends of Cromford Canal; Friends of Darley Open Spaces; Heritage Lottery Fund; Historic England; ICOMOS UK; John Smedleys; Marketing Peak District and Derbyshire; Milford and Makeney Community Group; Natural England; Peak District National Park; Sir Richard Arkwright's Masson Mills; The Strutts Society; The International Committee on the Conservation of the Industrial Heritage; Transition Belper; University of Derby; Derbyshire Association of Local Councils.

Also comparable to FSDR's aims but a far simpler model, the Monsal Trail – a walking and cycling trail running along the former Midland Railway line for 8.5 miles – is maintained by the Peak District National Park Authority, and restoration of its tunnels was undertaken using £2.25 million funding from the Department of Transport.

Tarnside undertook benchmarking against a number of industrial or open air heritage museum sites across the UK (Appendix 1), ranging in turnover from under £1m to over £12m.

In most cases donation income accounted for less than 30% of overall income, with a far greater reliance on income from visitors and trading income. The cost of raising funds in most cases exceeded income from donations; these sites are therefore operating a more ticket-based income model. With one exception, income from trading was consistently around 20%-30%, indicating the importance of on site catering and retail to sites of this nature. It is also notable that none of the sites we surveyed generated any income from investments, indicating that none have endowments to provide them with any regular income.

Observation

In addition to cafes and shops to complement the core offer and create a day trip destination, there is a common thread among the sites we surveyed that they had either installed or were planning to install an adventure playground. This could be worth considering in the list of projects being developed by FSDR.

“Specifically the Trust will focus on organic growth by providing a consistent core offer along with a programme of events and will also seek funding for the installation of a bespoke adventure playground experience at Blists Hill Victorian Town to attract new visitors. Similar organisations have reported significant increases in visitor numbers following the installation of adventure play schemes.”

Ironbridge Gorge Museum Trust annual report (2019)



2.2. FUNDRAISING APPEALS

Tarnside reviewed a number of comparable fundraising appeals of similar overall scale and with similar aims and objectives. In all cases the National Lottery Heritage Fund (formerly Heritage Lottery Fund) was a key partner in achieving the overall funding target.

Case Study 1: Yorkshire's Magnificent Journey Appeal

Total £9m – Heritage Lottery Fund £4.4m, other grants £1.2m legacies £2.3m, private donations £1.1m

The North Yorkshire Moors Railway (NYMR) is a preserved historic railway stretching for 18 miles through the heart of the North York Moors National Park, from Pickering via Levisham, Newton Dale and Goathland to Grosmont, with a further 6 mile extension over Network Rail's Esk Valley line to Whitby and occasionally Battersby. It is the largest preserved heritage railway in the UK in terms of route mileage operated and passenger numbers. In 2017 the railway celebrated its 50th anniversary of the founding of the North Yorkshire Moors Railway Preservation Society. The NYMR held discussions with the National Lottery Heritage Fund, noting that the NLHF's emphasis is less on the nuts and bolts of heritage management, and more on making sure that people get the most from their heritage. They agreed with NLHF to move forward with a portfolio scheme consisting of seven separate projects across all parts of the railway. The total programme cost was £9 million and the NLHF committed to provide nearly half.

NYMR had received legacies worth more than £2.3 million which they put towards the total goal. They launched an appeal to raise a further £1 million over five years 2017-2022. In their Annual Report for the year ending Feb 2020, NYMR reported: "Following National Lottery Heritage Fund Stage One approval a huge effort by volunteers, supported by external consultants, resulted in submission of a detailed bid for NLHF Stage Two assessment. Additional applications were made to the

Rural Payments Agency (part of the UK Department for Environmental, Farming and Rural Affairs) for an EU tourism development grant and to the Local Enterprise Partnership. The successful outcome of all three bids in April 2019, with total grant support of just over £6.6 million, means all of Yorkshire's Magnificent Journey projects will be implemented over the next five years. The NLHF award of £4.4 million requires match funding, of which most is already secured leaving approximately £300k to be raised over the next four years."

Observation

Almost 90% of the funds for this appeal came from major grants and legacies, with only around £1m to be raised through public appeal. Nevertheless, the Trustees reported that "Finding the matched funds of £4.6 million has been challenging". Unexpected urgent repairs to a bridge alongside the appeal projects depleted their cash reserved in 2019/2020, leaving them exposed to Covid 19 for which they had to raise £400k in an emergency appeal. Undertaking a major appeal on this scale should be looked at alongside annual operating costs and prudent cash reserves to protect against the unforeseen.

Case Study 2: Remaking Beamish

Total £20.9m – Heritage Lottery Fund £10.9m, Capital Kickstart £1m, other grants and donations £9m

Beamish is a world famous open air museum, telling the story of life in North East England during the 1820s, 1900s & 1940s. Remaking Beamish is the biggest development in Beamish's history: the exciting project includes over 25 new exhibits and attractions and is bringing a new era to the museum in the form of a 1950s Town and 1950s farm. Plans also include developing the 1820s area with a quilter's cottage, a pottery and a Georgian tavern, as well as transport developments including a trolleybus system. The expansion aims to increase visitor numbers by an extra 100,000 and will enable the museum to offer overnight stays.

The centrepiece of the Remaking Beamish project will be the reconstructed 1950s Town. The 1950s terrace includes a cafe, fish and chip shop, hairdresser's and a house based on the former home of artist Norman Cornish. The terrace is due to open to visitors in 2022.

A park, due to open spring 2022, will provide an outdoor space with a playground, allotments and putting green, including 1950s-style playground equipment that will meet 21st century safety standards. The 1950s Town will also include a cinema, toy shop, police houses, electrical shop, semi-detached houses and a bowling green and pavilion. Aged miners' homes will provide a space for people living with dementia or other long-term health conditions.

The project has been supported by £10.9m of National Lottery Heritage Funding, and a range of other sources including local, regional and national trusts and foundations, the Friends of Beamish, Beamish's Business Friends scheme and sponsorships, Arts Council England funding, local authority funding and the museum's own resources.

Observation

When announced, the cost of Remaking Beamish was £17m; in 2016 when NLHF support was confirmed, it was £18m. By 2021 it was £20m. Initial cost estimates in major capital development projects almost always increase significantly on delivery.

Case Study 3: Bowes Museum Endowment Appeal

Total £2m – Heritage Lottery Fund £1m, private donations £1m

The Bowes Museum is a museum of art, fashion and design in Barnard Castle housing internationally significant collections of fine and decorative arts. It was purpose built in the 19th century by John and Joséphine Bowes, who founded the Museum and contributed much of its collections.

John Bowes created an endowment fund for the Museum before his death in 1885, seven years before it opened to the public. The fund provided a valuable income stream for the Museum, but income had not kept pace with the cost of maintaining the building and collections. The Museum was successful in an application to Catalyst: Endowments, a £30 million investment in a match-funding initiative for the creation of endowments to support the UK's heritage from the Heritage Lottery Fund (HLF) and the Department for Culture, Media and Sport (DCMS) which ran from 2013-2017.

The target for The Bowes Museum was to generate a minimum of £1 million over four years ending on 30 June 2016 to be matched 1:1. This would give the Museum a total Endowment of £2 million which it would aim to continue building after the funding period ended. The Endowment would be invested permanently to provide income in perpetuity which would support the Museum's charitable activities. In December 2015, the Museum secured a private benefactor who promised to double all donations to the Catalyst Endowment from

wherever they came. The Friends of The Bowes Museum also offered to double these donations, which would, in turn, be doubled again by the Heritage Lottery Fund. This multiplying effect meant that every £10 donated with Gift Aid became £100 in the Endowment.

Observation

The Bowes Museum already had an endowment before this appeal was launched so they were not starting from zero; today, 5 years after their successful appeal, their investment income is £162k per annum, which represents just 6% of their annual income. It takes a great deal of time and effort to secure sufficient capital for an endowment to make a meaningful difference, and in the case of the Bowes Museum this was only possible due to a combination of the Catalyst: Endowments scheme and private match funding.

Case Study 4: Durham Cathedral Open Treasure

Total £11m – Heritage Lottery Fund £3.9m, sale of land and other resources c£4m, private donations c£2.9m

Open Treasure aimed to maximise the potential of Durham Cathedral's collection of artefacts and manuscripts to contribute to the sustainability of the cathedral, and to make the cathedral accessible to all through the creation of new visitor experiences, facilities and spaces.

Open Treasure took three years to deliver, and offers a range of exhibits around the Treasures of St Cuthbert, which the Cathedral describes as "some of the most significant surviving Anglo-Saxon artefacts in the UK". Visitors can walk in the footsteps of the monks, visiting their living quarters and exploring the space each monk had for sleep and study. There are also changing exhibitions as well as interactive opportunities to, for instance, dress up as a Benedictine monk and smell incense, beeswax and medieval kitchen spices.

An evaluation on Historic England's website¹ reports:

The completion of a feasibility study in 2010 into visitor experiences and facilities at Durham World Heritage Site (WHS) prompted the cathedral to start considering options to address issues around access, facilities and presentation. Although receiving 750,000 visitors per year, some areas were either not publicly accessible, such as the Monks' Dormitory, or not well visited, like the café. There was also only a small

display area for the cathedral's collections, including three copies of Magna Carta.

This project has improved visitor welcome and accessibility, renovated the café and shop, and created several new exhibition spaces, including Open Treasure in the Monks' Dormitory. The Activity Plan will help engagement with both local and wider audiences, including more work with schools and prisons.

...Initial scoping suggested a cost of £7 million, however this grew during the project, mainly due to the need for external stonework repairs around key project areas. This was discovered after the cathedral team had completed most of its grant applications. Providentially, the local authority approached the cathedral at this time over potentially selling an area of arable land to the council for development. This sale allowed the cathedral to cover most of the cost increase.

...There were some issues to overcome relating to HLF criteria, and the project may have been overambitious in the number of criteria it chose and how these were met. More HLF advice on the criteria expected for this type of project would have been welcome.

The project aimed to attract 120,000 new visitors a year, but in its first year of operation it saw only 44,000.

Observation

As with Remaking Beamish, costs for this project went up significantly during the deliver phase. Durham Cathedral reflected that more time scoping the project and considering issues around staff skills and cost increases could have helped it to be more ambitious in its grant applications. It is also worth noting the disappointing number of visitors compared with those envisaged when the project was originally conceived.



3. TRUSTS AND FOUNDATIONS

BACKGROUND

Trust and foundations provide about £2 billion a year in grants to UK charities. Whilst there is considerable competition for this money as most charities seek trust grants, the clarity on criteria and processes makes for straightforward and effective fundraising. According to an article in The Telegraph, “Charities are spending £1.1bn a year applying for grants”²

POTENTIAL FOR STOCKTON AND DARLINGTON RAILWAY

The research attached to this report indicates significant potential for S&DR from trusts and foundations. The research has identified 33 trusts, foundations and public sector grantmaking bodies with relevant interests: 18 national trusts with combined grant-making of £509m, and 15 local trusts with combined grant-making of £39m.

Examples include:

Garfield Weston Foundation – this national charity gives £79m in grants every year, and includes support for organisations that conserve and interpret our nation’s heritage, enabling it to be accessible and enjoyed by all.

Catherine Cookson Charitable Trust – this trust was established in 1977 and endowed by the late Catherine Cookson, the famous author and keen philanthropist. The trust supports causes with grants up to £100k that the trustees feel coincide with the wishes expressed by the settlor during her lifetime – education, conservation and arts and culture – with a focus on her native North East.

Charles Hayward Foundation – this foundation gives £2m a year, with one major priority area being protecting, restoring and interpreting past inventions, discoveries, industrial sites and defining moments that have shaped our history and identity, and displaying them in a modern context for public engagement, use and learning.

Research into national grantmakers focussed on those with an interest in heritage, as this is the main aim of the S&DR and its projects. It was beyond the scope of this report to research trusts and foundations with an interest in open space, environment, wellbeing and STEM education, which all offer further potential angles for securing funding for some of the individual elements within the overall portfolio of projects proposed.

² 11 October 2019, “Charities are spending £1.1bn a year applying for grants – but 63 per cent fail in their bids”.

Observation

Many of the larger trusts and foundations determine the size of their grant as a percentage of the overall project cost. As illustrated in the experience of Durham Cathedral above, if costs increase between applications to trusts and project delivery, this can negatively impact the grant secured as a proportion of the cost. It is essential to be as realistic as possible in scoping costs for major capital works, factoring in likely increases in materials, labour and inflation of the project period as well as sensible levels of contingency.



4. HIGH NET WORTH INDIVIDUALS

BACKGROUND

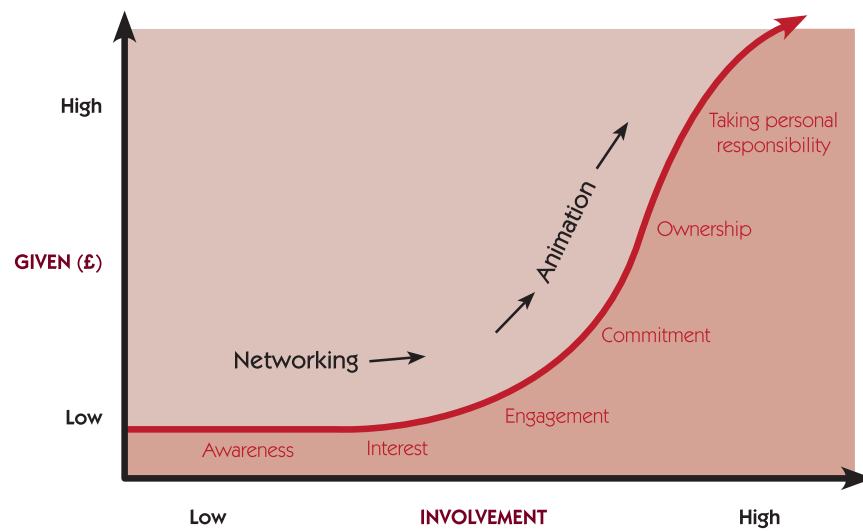
Income from major donors accounts for c.4% of UK charity giving. It is not possible to see what proportion the 'average' charity derives from major gifts but wealthy individuals are making more, and larger gifts. What constitutes a 'major gift' is hard to define: research indicates the majority of charities would see a gift of over £5,000 as a major donation. Looking at local arts and heritage charities, supporters lists consistently thank individuals giving at a substantial level of £1,000+. Major donors are of immense importance to the cultural sector.

POTENTIAL FOR STOCKTON AND DARLINGTON RAILWAY

Research focussed on High Net Worth Individuals (HNWIs), with the potential either to give directly to a project like that proposed by S&DR or to act as a high profile ambassador to encourage others to give. The research attached identified 18 HNWIs with a connection to or interest in the geographical area around Stockton and Darlington Railway, and a further 15 HNWIs across the UK with an interest in railways or railway history.

Many of these are high profile and the majority will have many causes competing for their attention. It can take 18-24 months to successfully cultivate a major gift, and 'cold call' appeals rarely if ever succeed. People give at a substantial level to causes with which they feel an affinity, and where they understand its aims and feel they have a role to play in its future. Tarnside's Curve of Involvement model, below, demonstrates how a journey of involvement with a charity encourages major gifts: as people develop a relationship with a charity, they develop a sense of ownership and responsibility and in turn give more of their time and resource.

The Tarnside Curve of Involvement©



✓ Recommendation

FSDR should focus initially on identifying any existing personal connections with any of the individuals identified through its trustees, members or volunteers.



5. CORPORATE SUPPORT

BACKGROUND

Corporate Giving accounts for only a small proportion of overall UK giving (4%) – though because it tends to be very visible, it is often overestimated. Within the arts and heritage world, ‘big ticket’ sponsorship arrangements at flagship venues like Tate and British Museum are well known.

Footfall, visibility and other marketing criteria no doubt determine many high level decisions about sponsorship: however personal interest amongst high level individuals will be key. Though the entity sponsoring is a corporation, those making decisions will be people.

FSDR have identified that companies offer a source not only of potential funds but also of volunteer engagement. This represents an excellent opportunity to engage with local companies, many of whom have a track record in volunteering and in some cases a formal programme to coordinate their staff volunteer activity. There is also an increased public engagement with volunteering as a result of the Covid 19 pandemic: a recent ICM poll indicates that 12.4 million adults have volunteered during the pandemic, of which 4.6 million were first time volunteers.

POTENTIAL FOR STOCKTON AND DARLINGTON RAILWAY

Locally, there is encouraging evidence of businesses in the area being supportive of community projects in Darlington and Stockton, both through charitable giving and through volunteering.

Example 1:

Darlington Cares is a local volunteer organisation coordinating opportunities for business employees to work on community projects. For example in 2018, volunteers from the town’s businesses worked with pupils of St Mary’s Cockerton Primary School for two days to transform a school garden into an outdoor classroom. The project was supported by Darlington Building Society and was delivered in partnership with Groundwork North East and Cumbria, which arranged for the more technical and heavy-duty work to be done.

Example 2:

Darlington Building Society has committed to give 5% of net profits in grants every year to 2025; these grants are chosen by Building Society members and disbursed by the County Durham Community Fund. Grants have been given totalling £60k in 2021 to a range of local causes.

Research has identified 24 companies with a geographical connection to the Stockton and Darlington Railway Line. These range from individual local firms, such as Latimer Hinks solicitors in Darlington, to sites belonging to large international groups, often in the technical or industrial sector. As requested by FSDR, the research looks at evidence of charitable giving, evidence of volunteer activity, and where relevant whether they have any track record of supporting and engaging with the promotion of Science, Technology, Engineering and Maths (STEM).

✓ Recommendation

FSDR should focus initially on identifying any existing personal connections with any of the local companies identified. Approaches to companies where there is no personal link will be more likely to generate lasting involvement if they are tailored to the interests of the company rather than the needs of S&DR. Volunteering offers great potential as a way to initiate involvement, as does the promotion of STEM among children and young people.



APPENDIX 1: FSDR BENCHMARKING

Name	Visitors p.a. (where published)	Location and nature	Principal funders where relevant	Turnover (most recent available)	Charitable activities income	Charitable activities as %age income	Donations and legacy income	Donations & Legacies as %age income	Trading income	Trading as %age income	Investment income	Investment as %age income	Other income	Other as %age income	Expenditure on fundraising	Fundraising spend as %age donas/leg
North York Moors Historical Railway Trust	300000	North Yorkshire Moors Railway is a preserved historic railway stretching for 18 miles through the heart of the North York Moors National Park	2019/2020 included £1.07m income from government grants.	£8,860,000	£4,030,000	45%	£2,260,000	26%	£2,560,000	29%	£13,000	0%			£1,840,000	81%
Midland Railway Butterley (Midland Railway Trust)		Museum and working railway in Derbyshire dedicated to history of Midland Railway		£715,224	£273,000	38%	£210,000	29%	£232,000	32%	£436	0%	£0	0%	£461,000	220%
Sheffield Industrial Museums Trust	85000	The Trust manages two sites in Sheffield: Kelham Island Museum and Abbeydale Industrial Hamlet. The former is the city's industrial museum and the latter is a restored water-powered works dating from the 18th Century.	Sheffield Industrial Museums Trust is funded by Sheffield City Council, Sheffield Hallam University and the Heritage Lottery Fund. NB Very recently (2021), a new registration at the Charity Commission has been made for the Sheffield Museums Trust, which will operate 6 sites altogether. There is no financial information available for it yet.	£1,044,949	£787,000	75%	£11,000	1%	£233,000	22%	£0	0%	£15,000	1%	£249,000	2263%
Crich Tramway Museum (The Tramway Museum Society)	145000	Home of the National Tramway Museum in Crich, Derbyshire.		£3,095,000	£1,230,000	40%	£981,000	32%	£596,000	19%	£9,000	0%	£275,000	9%	£577,000	59%

Name	Visitors p.a. (where published)	Location and nature	Principal funders where relevant	Turnover (most recent available)	Charitable activities income	Charitable activities as %age income	Donations and legacy income	Donations & Legacies as %age income	Trading income	Trading as %age income	Investment income	Investment as %age income	Other income	Other as %age income	Expenditure on fundraising	Fundraising spend as %age donas/leg
Chatham Historic Dockyard	174000	The "most complete and best preserved dockyard of the age of sail" in Chatham, Kent.	The Kent Medway National Portfolio Organisation (NPO) Partnership is a consortium of four museums – The Historic Dockyard Chatham, Canterbury Museums & Galleries, Guildhall Museum Rochester and Tunbridge Wells Museum & Art Gallery – the Amelia – funded by Arts Council England (ACE) as a National Portfolio Organisation to work together to deliver excellence in the use of collections and to inspire learning, creativity and wellbeing to existing and new audiences in their communities.	£8,625,233	£4,820,000	56%	£1,520,000 (*this 2020 figure is about half the equivalent figure for 2019, presumably due to Covid loss of visitors)	18%	£2,280,000	26%	£39	0%	£4,000	0%	£2,200,000	145%
Ironbridge Gorge Museum Trust	432000	World Heritage Site incorporating several museums in Shropshire.	Arts Council England National Portfolio organisation (revenue funding); National Lottery Heritage Fund (capital funding).	£5,819,000	£2,440,000	42%	£1,730,000	30%	£1,390,000	24%	£13,000	0%	£258,000	4%	£1,240,000	72%
Beamish Museum	803000	Living museum in County Durham, telling "the story of everyday life in the North East of England".	Arts Council England National Portfolio organisation (revenue funding); National Lottery Heritage Fund (capital funding).	£12,495,000	£6,430,000	51%	£921,000	7%	£4,750,000	38%		0%	£577,000	5%	£3,280,000	356%
Museum of the Broads	8000	Museum near Norwich, Norfolk, exploring the history of the Broads.		£104,369	£53,389	51%	£48,632	47%	£1,683	2%	£665	1%		0%		
Chiltern Open Air Museum	54000	Working farm, orchard, old buildings and outdoor displays recollecting life in the Chilterns, Buckinghamshire.		£733,638	£373,325	51%	£151,602	21%	£206,291	28%	£2,420	0%		0%	£159,546	105%
Museum of East Anglian Life	25000	Estate of buildings and displays exploring history of East Anglia in Suffolk.		£795,526	£57,055	7%	£569,440	72%	£146,285	18%	£96	0%	£22,650	3%	£67,547	12%

APPENDIX 2: TRUSTS AND FOUNDATIONS

RESEARCH INTO POTENTIAL TRUSTS AND FOUNDATION FUNDERS FOR FRIENDS OF STOCKTON & DARLINGTON RAILWAY

Background: Friends of the Stockton and Darlington Railway is seeking to identify potential trusts and foundations to support a range of projects by 2025.

The research has identified 33 trusts, foundations and public sector grantmaking bodies with relevant interests, 18 national and 15 local, giving a cumulative total of £548m per annum.

Sources: Charity Commission, FundsOnline, organisational websites and annual reports.

The following are 18 national grantmakers with relevant interests, giving per annum a total of £509m

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
National Lottery Heritage Fund	£250,000,000	The National Lottery Heritage Fund is the largest dedicated grant funder of the UK's heritage. Since 1994, they have awarded over £8bn to more than 44,000 projects across the UK. The National Lottery Heritage Fund Grants for Heritage programme offers grants from £3,000 to £5,000,000.	Simon Thurley CBE Baroness Kay Andrews OBE Maria Adebawale-Schwarte Jim Dixon Dr Claire Feehily Sarah Flannigan Ray Macfarlane Professor David Stocker Mukesh Sharma MBE DL		As a result of Covid, the Fund is currently prioritising projects which will: boost the local economy; encourage skills development and job creation; support wellbeing; create better places to live, work and visit; improve the resilience of organisations working in heritage. All projects also need to achieve the outcome that 'a wider range of people will be involved in heritage'. All projects must also demonstrate that they are building long-term environmental sustainability into their plans, as appropriate.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Historic England	£100,000,000	The public body that helps people care for, enjoy and celebrate England's spectacular historic environment. Funded by the Department of Culture, Media and Sport. Part of their work includes grant funding through a range of programmes; the Repair Grant programme gives grants towards the repair and conservation of listed buildings, scheduled monuments and registered parks and gardens.	Sir Laurie Magnus Alex Balfour Nicholas Boys Smith Professor Martin Daunton Sandie Dawe CBE Ben Derbyshire Sandra Dinneen Paul Farmer Professor Helena Hamerow Victoria Harley Michael Morrison Patrick Newberry Susie Thornberry Richard Upton Sue Wilkinson	Made grants to buildings and monuments totalling £14m in 2019/2020. Grants are not itemised in the Annual Accounts or on the website.	HE prioritises repair grants to places identified on the Heritage At Risk register.
Garfield Weston Foundation	£79,000,000	The Garfield Weston Foundation was established in 1958 by Willard Garfield Weston, creator of Associated British Foods. The foundation supports a broad range of charities across the UK that make a positive difference in the area of welfare, young people, community, arts, faith, environment, education, health, museum and heritage.	Jana Khayat Kate Hobhouse Eliza Mitchell George Weston Sophia Mason Alannah Weston Melissa Murdoch Guy Weston Geordie Dalglish		Funds a broad spectrum of activities, including: Museums & Heritage : organisations that conserve and interpret our nation's heritage, enabling it to be accessible and enjoyed by all. Environment: projects across the UK from practical conservation to education work and volunteering. Education: support for education and learning, both within formal school settings and lifelong learning projects. Community: a significant volume of grants every year to Community projects, many of which rely on the time and goodwill of volunteers. The Foundation tends to look to help 'close the gap' after significant fundraising (at least 50%) has been undertaken already.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Julia and Hans Rausing Trust	£25,000,000	<p>The Trust exists to realise the philanthropy of Hans Rausing and Julia Rausing. Since its formation, it has provided over 600 grants totalling more than £250 million. Funding is given to organisations working within three main areas: Health and Wellbeing; Welfare and Education; and Arts and Culture.</p> <p>The Julia and Hans Rausing Trust does not accept unsolicited applications for funding, except where specified within occasional grant programmes that may be announced from time to time.</p>	<p>The Trust is a named fund held within The Master Charitable Trust (MCT). The MCT is a donor-advised fund managed by C. Hoare & Co. Bank and is a registered charity (number 1139904). Donations made from The Julia and Hans Rausing Trust are directed by Julia and Hans Rausing and verified by Messrs. Hoare Trustees.</p>		<p>Under Arts and Culture, they specifically support major art and cultural institutions, as well as heritage sites of national significance. The aim is to increase understanding of and improve access to many of these places.</p>
Fidelity UK Foundation	£11,000,000	<p>The Fidelity UK Foundation makes grants to charities serving beneficiaries in the United Kingdom, primarily in London, Kent and Surrey, although applications are also considered from elsewhere in the UK, where the organisation is nationally-recognised as a centre of excellence. One priority area is arts and heritage, including nationally significant heritage sites, internationally recognised museums and class leading organisations in the visual and performing arts.</p>	<p>Anthony Bolton; John Owen; Sally Walden; Abigail Johnson; Elizabeth Johnson; Dr Malcolm Rogers; Sanjeev Gandhi; Peter Goldsborough; Edward Johnson.</p>	<p>Black Country Living Museum (£75,000)</p>	<p>Make transformational gifts and look for resilient business plans and projects making lasting change. In terms of capital projects, they award to large-scale projects central to the overall growth and sustainability of the applicant, such as new construction, renovations, expansions, equipment and other initiatives that support the organisation's strategic vision. Typically require applicants to have income of £500k+.</p> <p>The majority of awards fall in the £25,000 to £150,000 range. Grants for projects with a particularly compelling investment case including significant measurable outcomes can exceed £150,000.</p>

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Denise Coates Foundation	£10,000,000	<p>General charitable purposes with an emphasis on the provision of facilities for the promotion of community participation in healthy recreation.</p> <p>The foundation was registered in September 2012. It formerly shared its name with Bet365 (Ltd), which was set up by Denise Coates. Her father, Peter Coates, also a trustee, is Chairman of Stoke City FC, of which Bet365 Ltd is also a major shareholder.</p>	Peter Coates, John Coates, Simon Galletley, Denise Coates, James White		<p>Previously, support has been given to the following causes:</p> <p>Health and welfare</p> <p>Education and training</p> <p>Community development</p> <p>Medical research and development</p> <p>Disaster recovery/emergency relief</p> <p>Arts and culture</p>
Michael Uren Foundation	£8,000,000	<p>The foundation was established in 2002 following an initial gift from Michael Uren. The foundation supports charities working in the following priority areas:</p> <p>Armed forces</p> <p>Medical</p> <p>Animal welfare</p> <p>Education – supporting the furtherance of education, with a specific focus on the sciences, engineering and technology</p> <p>Historic buildings – the restoration and continued maintenance of historic buildings.</p>	Anne Gregory-Jones; Janis Bennett; Roger Gould; David Uren; Robert Uren.	Chatham Historic Dockyard Trust (£1m)	<p>Michael Uren (d.2019) studied Mechanical Engineering and Motive Power at Imperial College. He founded Civil and Marine Ltd and built it into one of the UK's foremost innovators in cement manufacture. The company pioneered the use of blast furnace slag – an industrial waste product – to manufacture a new kind of cement with 90% less carbon emissions than traditional methods. He was a great philanthropist, giving to medical research, education, the armed forces and the conservation of wildlife.</p>

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Biffa Awards	£4,000,000	Biffa Award money comes from Landfill Tax Credits, reclaimed from the Government through the Landfill Communities Fund (LCF). The scheme is regulated by ENTRUST, which ensures that the tax credit is awarded and managed according to Government regulations. The project site must be within five miles of a significant Biffa operation or within 10 miles of an active Biffa Landfill site. Funds are offered under four headings: rebuilding biodiversity; community buildings; recreation; partnership.	Andrew Moffat Jackie Doone Patience Thody Rob Jones Debbie Tann Mick Davis		Projects under the Recreation theme can include new play equipment; landscaping works, including boardwalks, trees and shrubs; skate parks; woodland walks; nature trails; outdoor gyms; and building works within communal areas of sporting clubhouses (such as kitchen and toilet facilities) which have a wider community use and are not for the sole use of sports club members. It generally includes projects that benefit people within their free time. Under this theme an applicant will have to show evidence of wider community use, involvement and consultation. Between £10,000 and £75,000 can be awarded to projects that have a total cost of less than £200,000 including VAT
Headley Trust	£4,000,000	The Headley Trust is one of the Sainsbury Family Charitable Trusts. It makes grants in the areas of: arts and heritage in the UK and overseas; cathedrals and major Churches; developing countries; education; health & social welfare.	Timothy James Sainsbury Lady Susan Sainsbury Judith Susan Portrait The Rt Hon Sir Timothy Sainsbury Camilla Davan Sainsbury Amanda McCrystal		Specific interest in two relevant areas: Conservation of industrial, maritime and built heritage Regional museums and galleries, with special consideration for curatorial support and acquisitions
Architectural Heritage Fund	£3,750,000	The fund was established in 1976 to promote the conservation and sustainable re-use of historic buildings for the benefit of communities across the UK. The fund strongly believes that 'better places can be built through community enterprise' and that 'historical buildings and places play an essential role in our everyday lives, our cultural identity and our economy'.	Dr Neal Sashore; Gregory Pickup; Carole-Anne Davies; Kate Dickson; Myra Barnes; Elizabeth Peace; David Hunter; Suzanne Snowden; Susan Brown; Adebayo Alao; Karen Latimer; Eleanor McAlliser; Roy Hodson; Graham Fisher; James Bowdidge.		The fund offers a unique range of support, designed to cover the life-cycle of a given project. This includes start-up advice, grants and loans.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
The Pilgrim Trust	£3,480,000	The Pilgrim Trust was founded in 1930 by the wealthy American philanthropist Edward Stephen Harkness. The first trustees decided that the trust should assist with social welfare projects, preservation (of buildings and countryside) and the promotion of art and learning.	Sir Mark Jones; The Hon. Lady Sarah Riddell; Sarah Staniforth; Kevin Pakenham; Caroline Butler; David Barrie; Joan Winterkorn; Atulkumar Patel; Marie Staunton; Alexander Sturgis.		One priority area is: Preservation of and repairs to historic buildings and architectural features. Special consideration is given to projects that give new use to buildings which are at risk and of outstanding importance
Swire Charitable Trust	£3,000,000	Currently, grants are made through the following programmes: Opportunity Environment Heritage Under heritage, funding is given to projects that can deliver social and economic benefits to deprived communities or disadvantaged people and charities working to safeguard endangered skills. Preference is given to grass-roots organisations that engage with the local community.	Barnaby Swire; John Swire; Merlin Swire; Samuel Swire; Martha Allfrey; Rupert Hogg.	Bletchley Park Trust (£10,000)	There is no maximum or minimum grant size and multi-year grants may be considered if a longer term commitment (up to three years) can be clearly justified.
Charles Hayward Foundation	£2,210,000	Main grant programme – social and criminal justice and heritage and conservation (for charities with an income of more than £350,000) and overseas aid (for charities with an income between £150,000 and £5 million)	Susan Heath; Julia Chamberlain; Caroline Donald; Richard Griffith; Alexander Heath; Brian Insch; Nikolas van Leuven.		Main focus under Heritage is on protecting, restoring and interpreting past inventions, discoveries, industrial sites and defining moments that have shaped our history and identity, and displaying them in a modern context for public engagement, use and learning.
Michael Bishop Foundation	£1,600,000	General charitable purposes; arts, culture and heritage; human rights and social justice; health and medicine; education and training.	Grahame Elliott; Baron Glendonbrook of Bowdon; Timothy Bye; Martin Ritchie.		Michael Bishop (Lord Glendonbrook CBE) is a British businessman and life peer who rose to prominence as owner of the airline BMI.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Catherine Cookson Charitable Trust	£1,320,000	<p>The trust was established in 1977 and endowed by the late Catherine Cookson, the famous author and keen philanthropist. The trust supports causes that the trustees feel coincide with the wishes expressed by the settlor during her lifetime:</p> <p>Education and training</p> <p>Environment and conservation</p> <p>Arts and culture</p>	Peter Magnay; David Hawkins; Hugh Marshall; Daniel Sallows.		Organisations can apply for funding of between £250 and £100,000. Applications are invited from all parts of the UK, and are particularly welcomed from the settlor's native area, the North East of England
G & K Boyes Charitable Trust	£1,000,000	<p>Registered in 2016. Focuses its giving on the following areas:</p> <p>Environment; education; medical research, in particular dementia and brain tumors; health; heritage.</p>	Mr R A Henderson; Mrs A Dalmahoy; Mark Cannon-Brookes; Cripps Trust Corporation Limited.		<p>Specific aims include:</p> <p>The preservation, for the benefit of the nation, of land and buildings of beauty or historic interest and the preservation of furniture, pictures, and chattels of any description having national, historic, or artistic interest</p>
Charles Dunstone Charitable Trust	£917,000	<p>Established in 2001 for general charitable purposes, this is the charitable trust of Charles Dunstone, co-founder of the Carphone Warehouse. General charitable purposes including: arts and culture; children and young people; community care; education and training; health and disability; social welfare; heritage and restoration.</p>	Denis Dunstone; Adrian Bott; John Gordon; Robert Clarkson.	Brighton Belle (£500,000)	<p>The 2019/20 annual report states: The Trust is currently fully committed and does not plan to make any new grants for the foreseeable future. Existing beneficiaries of the Trust will be notified of any change to this situation. The trustees strongly advise against submitting any unsolicited applications to the Trust.</p> <p>Worth monitoring for future potential as clear interest in railway heritage from grant to Brighton Belle.</p>

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Historic Houses Foundation	£700,000	The foundation was established in 2005 as the Country Houses Foundation. It changed its name to Historic Houses Foundation in 2019 following a merger with the Heritage Conservation Trust.	Nicholas Barber; Norman Hudson; Sir Andrew Jardine; Mary King; Jeremy Musson; Sir John Parsons; Oliver Pearcey; Richard Compton.		Its main aims are: <ul style="list-style-type: none"> - to support the preservation of buildings of historic or architectural significance and their gardens and grounds - to support the restoration and conservation of works of art in historic houses open to the public.
Bruntwood Charity	£95,500	Established for general charitable purposes, where the company has a presence. Funds 'fully committed' for now so not accepting applications.	Supported causes include Tate Liverpool, Chetham's School of Music, Bluecoat, Manchester International Festival, and others. Appears to select charities for ongoing support.	Katharine Vokes Sally Hill Kathryn Graham Jane Williams Peter Crowther.	Mainly in Manchester, Leeds, Liverpool and Birmingham - Bruntwood also has a presence in Cheshire.
Pennycress Trust	£87,076	Makes grants to smaller charities in Norfolk and Cheshire. NB Spending has been higher usually, over £100,000 in 2015, and 2017.	No details available.	Charles Cholmondley Lady Rose Cholmondley Lady Margot Huston Priscilla Dicketts	Norfolk and Cheshire. Occasionally national.
The Marjory Boddy Charitable Trust	£68,000	Trustees "prefer to award to organisations already known to them, or to new beneficiaries who impress them with a comprehensive application submission". NB Income rather higher at £103,000, hence inclusion.	No specific details available, but was split last year between cancer, support groups, youth clubs, disability and theatre.	Edward Walton Elizabeth Roberts William Benoy Hems de Winter.	North West England, in practice Cheshire, Wirral and North Wales.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Albert Gubay Charitable Foundation	unknown	This charity is based on the Isle of Man and was formed by Albert Gubay, Kwik Save founder, to redistribute the profits from his Derwent Group company to good causes. It is likely that the Catholic Church will receive at least half but his intention is that other funds would support 'a wide range of other charities'. The Derwent group has commercial property across the North West. Mr Gubay was born in Wales but had homes on the Isle of Man and in Wilmslow.	Few details available.	Not known	Not known

The following are 15 local grantmakers with relevant interests, giving per annum a total of £39m

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Lempriere Pringle 2015	£21,000,000	This charity was established in 2015 by philanthropist Jonathan Ruffer, co-founder of Ruffer Investment Management Limited. The charity funds three Auckland Castle based charities of which Jonathan Ruffer is a trustee – Auckland Castle Trust, Eleven Arches and The Zubaran Trust. The charity also funds the regeneration of Bishop Auckland and surrounding areas through the awarding of grants to charitable organisations.	Dr Jane Ruffer; Dr Norman Fraser; Elizabeth Booker; Jonathan Ruffer; Harriet O'Rourke; Richard Chartres; Ashe Windham.	The Auckland Project (£14.5 million); SHED (£3.5 million); Stockon Project (£121,600); First Fruit (£75,000).	The charity's 2019/20 annual report states: 'A major proportion of the organisation's resources is allocated to various sister trusts based at Auckland Castle, with the underlying aim of stimulating regeneration in Bishop Auckland and surrounding areas. Grants have also been made to a range of other charitable projects and initiatives in other areas.'

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
The Oglesby Charitable Trust	£3,400,000	<p>The Oglesby Charitable Trust was established in 1992 and has been active since the early 2000's. The funding of the trust comes from annual contributions from Bruntwood Limited, part of a group of North West England-based property investment companies owned by the founding trustees.</p> <p>The trust make grants across five broad areas: the arts and culture; education; the environment; medical aid and research; and tackling social and health inequalities.</p>	Jean Oglesby; Katharine Vokes; Jane Oglesby; Chris Oglesby; Kathryn Graham.		<p>The trust makes grants ranging from under £1,000 to over £1 million. Grants can be one-off but the majority are multi year. Funding proposals are only considered by invitation.</p> <p>Grant holders can also access 'Funding Plus', a range of non-financial resources including access to advice, training, networking, signposting, complimentary meeting room hire and opportunities to advertise volunteer roles and opportunities to Bruntwood staff.</p>
County Durham Community Foundation	£2,890,000	As with all community foundations, there are a number of donor advised funds managed on behalf of individuals, families and charitable trusts. Grant schemes tend to change frequently, therefore please consult the foundation's website for details of current programmes and their up-to-date deadlines.	Paul Chandler; Rebecca Armstrong; Duncan Barrie; Prof Ray Hudson; James Fenwick; Stephen Hall; Ann Dolphin; Emily Burns; Colin Proudfoot.		<p>Relevant programmes includes:</p> <p>Community Grants Programme Up to £5,000</p> <p>Darlington Grants Programme Up to £5,000</p> <p>Volunteer Support Fund Up to £5,000</p>
Greggs Foundation	£2,840,000	The Greggs Foundation was registered with the Charity Commission in 1987. It is the corporate charity of Greggs plc, the food retail group known for its baked goods. It gives to a range of causes including: social welfare; community; inequality; health; children and young people; the environment; older people; disability.	Andrew Davison; Richard Hutton; Roisin Currie; Jane Hartley; Fiona Nicholson; Kate Bradley; Karen Wilkinson-Bell; Sanjay Singh; Steve Haines; Mick Thompson.		<p>Grants are nationwide but with a focus on the north east of England, (Northumberland, Tyne & Wear, Durham and Teesside), and in the regional divisions of Greggs plc.</p> <p>The Foundation has a number of funds addressing different priorities.</p>

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Barbour Foundation	£2,400,000	The foundation was established in 1988 and is the corporate charity of British luxury clothing and lifestyle brand, J. Barbour and Sons Ltd. It was set up by Dame Margaret Barbour, with a gift of 20% of the company shares. The foundation supports charities and causes primarily in the North East of England (i.e Tyne and Wear, Northumberland, Durham, South Tyneside).	Helen Barbour; Dame Margaret Barbour; Nichola Bellaby.		Specific aim: The protection and preservation for the benefit of the public in the North East of England such features of cities, towns, villages and the countryside as are of special environmental, historical and architectural interest.
Ballinger Charitable Trust	£2,270,000	The Trust gives in the North East to projects related to health, development and wellbeing of young people; older people; cultural/arts projects. Grants range from £250 to £500,000.	Diana Ballinger; John Flynn; Andrew Ballinger; Nicola Crowther.		The trust has two funding streams for requests of less than £5,000 and greater than £5,000. Larger grants have recently focused on projects supporting children and young people living in deprived areas and to older people experiencing dementia.
Sir James Knott Trust	£1,580,000	The aim of the trust is to improve the conditions for people living and working in the North East of England in the areas of Tyne and Wear, Northumberland, County Durham and Hartlepool.	John Cresswell; Rev. Fiona Sample; Ben Speke; Sir Walter Riddell.		The trust supports a wide range of charitable causes, including: Arts and culture Community issues and events Conservation and environment Education and training Public services Health and sport Heritage and historic buildings Housing, homelessness, and hardship Maritime Public service Service related charities

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Virgin Money Foundation	£984,000	The foundation was registered with the Charity Commission in April 2015. It was established following the demise of the Northern Rock Foundation (established by the Northern Rock Bank which was purchased by the Virgin Money bank) to work 'in partnership with organisations who are committed to regenerating their area by investing in community activities that have a meaningful impact.'	Edward Wakefield; Mandip Kaur Sahota; Keith Merrin; Lorna Bennie; Hannah Underwood; Gregory Aldridge; Joanne Curry; Keith Burge; Edward Younger; Catherine Guthrie.		Funds community development and regeneration; social enterprise; children and young people. Focuses grants on the areas of Glasgow, Sheffield, Edinburgh, Norwich, Manchester, Cardiff, London, Leeds and North East England.
The 1989 Willan Charitable Trust	£507,000	The trust was established in 1989 out of funds originating from shipping business, for general charitable purposes, with a preference for benefiting organisations in the northeast of England. In recognition of the origins of the trust fund and the economic impact that the decline of shipbuilding has had on the region, the trustees tend to concentrate their support towards causes that are active in Tyne & Wear and its immediate surroundings.	Francis Chapman; Alex Ohlsson; Willan Trustee Ltd.		The trustees favour causes which aim to ease social deprivation and/or enrich the fabric of the local community and the quality of life of individuals within that community. They may also support education where that is aimed at improving the economy in areas of deprivation. Grants are given for core costs or projects, and awards typically range from £500 to £10,000, though there is no maximum or minimum grant.
Sir John Priestman Charitable Trust	£431,000	The trust was established in 1931 by Sir John Priestman for general charitable purposes and social welfare in the regions of County Durham and Sunderland. The charity makes grants to charitable organisations operating in these areas that work in poverty relief, to aid older people, to assist young people going to university, to maintain hospitals and convalescent homes and to benefit young people.	Peter Taylor; Timothy Norton; Thomas Greenwell; Jean Majer.		Do not fund heritage specifically, but may be interested in the social welfare benefits of the walking trails. Sir John Priestman (1855-1941) was a shipbuilder. He was born in Bishop Auckland, 12 miles from Darlington. He was a notable industrialist and philanthropist, giving a great deal to charity in the north east during his lifetime.

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Normanby Charitable Trust	£366,000	The Normanby Charitable Trust makes grants to other charities and organisations for general charitable purposes. In previous years the trust has given for a wide range of causes including health, sport, heritage education and social welfare. The trust has also occasionally given grants for the preservation of religious and secular buildings of historical or architectural interest.	The Marquis of Normanby; Lady Lepel Kornicki; Lady Peronel Cruz; Lady Henrietta Burridge; Nicholas Buchan.		Priority is given to organisations based in North Yorkshire and the North East of England however grants are occasionally made to organisations outside of the area of benefit.
The W A Handley Charity Trust	£299,000	This trust was founded and endowed by the late Wilfred Handley and his relatives. According to its 2019/20 annual report, the trustees aim to 'follow the wishes and interests of the trust's founder where this is compatible with the present day needs of the North East'. Makes grants in Northumberland; Tyne and Wear; County Durham (including Hartlepool); Cumbria (including Carlisle).	Bill Dryden; Tony Glenton; David Milligan.		Grants are typically made for: Social welfare Young people Older people People with disabilities Maritime and Service causes Education and training Employment Community benefit Historic and religious buildings Environment Music and the arts

Name	Annual Spending	Interest	Trustees	Relevant Grants	Notes
Hadrian Trust	£213,500	Makes grants for the benefit of the people and the environment of Tyne and Wear, Northumberland and Durham, including Hartlepool. Supports the fields of social welfare, youth, disability, the elderly, women, ethnic minorities, education, arts and the environment.	Pauline Dodgson; Jim Dias; Ian Brown; Colin Fitzpatrick; Catherine Wood; Dorothy Parker.		Most relevant grant programme is: Environment Projects that improve the environment and involve the local community and people Activities that promote sustainable environmental improvements Opportunities for social, educational and leisure activities for people of all ages within their local environments
Sir Tom Cowie Charitable Trust	£109,000	The primary purpose of the Trust is to fund projects which provide opportunities for young people and improve quality of life in less affluent communities in the City of Sunderland and County Durham. In addition, the Trust looks to support projects looking to link people living in the urban environment with the countryside and the natural environment. The Trustees would also look to support projects proposing to conserve and maintain historic and important buildings and projects looking to conserve and maintain wildlife and, particularly, threatened species in our region.	Peter Blackett; David Gray; Lady Diana Cowie.		Geographically, the Trust primarily supports projects in the City of Sunderland where Sir Tom was born, the area of Derwentside in County Durham where he lived, and the valleys of Teesdale and Weardale, which were landscapes he loved.
The Roy and Pixie Baker Charitable Trust	£68,000	Established in 1995, the trust makes grants to support registered charities throughout England and Wales, particularly in the North East.	Tony Glenton; George Straker; Leslie Caisley; Bill Dryden.		One of their four areas of grantmaking is: Protection and preservation of sites of historic or architectural interest in cities, towns, villages and the countryside of England

APPENDIX 3: INDIVIDUALS

RESEARCH INTO INDIVIDUALS AROUND STOCKTON & DARLINGTON RAILWAY

Background: Friends of Stockton & Darlington Railway is seeking information on high net worth individuals and people of influence who may become interested in the projects FSDR is aiming to achieve by 2025. This research focusses on links to wealth, to influential individuals and their track record of charitable giving.



The report is presented in two sections:



1. High Net Worth and influential individuals with a connection to or interest in the geographical area around Stockton and Darlington Railway
2. High Net Worth and influential individuals across the UK with an interest in railways or railway history



The research does not include intrusive information e.g. personal wealth unless where public information.



Sources: Charity Commission, Companies House, print journalism, company and organisational websites, annual reports, Sunday Times, Insider Media Ltd.



1. HIGH NET WORTH INDIVIDUALS IN THE REGION



Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 624 479 651">Harry Banks and family</p>	<p data-bbox="638 311 1153 451">The Banks Group is a family owned, County Durham based, business employing over 300 people across Scotland and the north of England. Its business is in surface coal mining, as well as property and renewable energy.</p>	<p data-bbox="1178 311 1453 395">The family is likely to be HNW through its ownership of Banks Group.</p>	<p data-bbox="1478 311 1995 539">The Banks Community Fund was formally established in 1997 to provide support to community groups, voluntary organisations and environmental projects that are charitable, educational, philanthropic or benevolent in purpose and which are located within close proximity of a current or proposed Banks Group development and provide benefit to the local community.</p> <p data-bbox="1478 571 1977 655">The fund is designed to support local communities that host Banks operations. It is administered by the County Durham Community Foundation.</p>
 <p data-bbox="235 1110 486 1137">Duncan Bannatyne OBE</p>	<p data-bbox="638 718 1153 802">Duncan Bannatyne is a well-known health club owner and former Dragon Den's investor. He owns a house in Yarm and also lives in Monaco.</p> <p data-bbox="638 834 1153 1121">After spending time in the Navy, he moved to Stockton-on-Tees, bought an ice cream van, and after expanding and selling that business, founded a care home business, which in turn he sold and set up Bannatyne Health & Leisure. He currently serves as the Chairman and CEO of the portfolio of companies, Bannatyne Group. Acquired 26 health clubs from Hilton Hotels in 2006 becoming the largest independent chain of health clubs in the United Kingdom.</p>	<p data-bbox="1178 718 1453 802">The Sunday Times Rich list 2020 estimates Duncan Bannatyne's wealth at £300m.</p>	<p data-bbox="1478 718 1995 1121">Duncan Bannatyne is founder of the Bannatyne Charitable Trust, which has donated more than £2m since 2008. Recipients include Scottish International Relief, Sport Relief, Help for Heroes, BBC's Children in Need, Against Breast Cancer, Help Harry Help Others, The Noble Gift Gala, Harry's Mission, Blue Lamp Foundation, Bannatyne's Bright Sparks, BNSPCC, St Michael's Hospice, Association of Carers, Action for Children, Birmingham Children's Hospital, CLIC Sargent, Fishing with Tom, Kenton School, Polam Hall, Lavender Trust, The Light Dragoons, University of Glasgow Trust, Breast Cancer Care, Save the Children, Marie Curie Cancer Care, RADA, RNIB and The Roy Castle Lung Cancer Foundation.</p>



Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 603 376 627">Alistair Bibby</p>	<p data-bbox="636 240 1153 379">Alistair Bibby was raised in Redcar and is now an Executive Director at Goldman Sachs in London. He has been at Goldman Sachs since 2011, having previously worked at BNP Paribas and Morgan Stanley.</p> <p data-bbox="636 387 1153 611">He says: "Now that I'm back in London I have become active in advocating for the region. It's important for people from the region to use their networks to advertise the potential our place has to offer. I am currently working with a group of like minded London based professionals from the North East who have influence in different sectors to form a group to promote the region"</p>	<p data-bbox="1180 240 1451 323">As an Executive Director of Goldman Sachs, he is likely to be a HNW individual.</p>	<p data-bbox="1478 240 2000 352">Alistair Bibby is an Ambassador for Redcar and Cleveland and for the MFC Foundation, and is a Patron of the Middlesbrough and Teesside Philanthropic Foundation</p>
 <p data-bbox="235 903 427 927">Steve Gibson OBE</p>	<p data-bbox="636 667 1153 1007">Born in Middlesbrough, Steve Gibson in 1981 founded Bulkhaul, a chemical logistics company involved in the transportation of bulk liquids, powders and gasses. He currently serves as its Managing Director. He became a director of Middlesbrough Football Club when he was 26 and Chairman in 1994 and continues to serve in the position. He is also a Co-Owner of the club. He is a director and majority shareholder of The Gibson O'Neill Company, the holding company of Middlesbrough Football Club, Bulkhaul and Rockliffe Hall hotel.</p>	<p data-bbox="1180 667 1451 778">Steve Gibson's wealth is estimated at £270m (Sunday Times Rich List 2020)</p>	<p data-bbox="1478 667 2000 778">Steve Gibson is founder of the MFC Foundation, the Middlesbrough Football Club's charitable arm. The foundation supports education, health, social inclusion and sport participation.</p> <p data-bbox="1478 810 2000 890">Both Middlesbrough FC and Bulkhaul are Patrons of the Middlesbrough and Teesside Philanthropic Foundation.</p>



Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 587 398 611">Dr Tony Gillham</p>	<p data-bbox="636 240 1153 379">Former industrialist Dr Tony Gillham MBE moved to Teesside in 1977 as Managing Director of Carless Chemicals, later leading a management buyout to form Chemoxy Chemicals which was later floated at the London Stock Exchange.</p>	<p data-bbox="1180 240 1451 379">The Gillham Charitable Trust had assets of c£400k according to the most recent available financial information.</p>	<p data-bbox="1478 240 1973 379">During his career in Teesside Tony Gillham became involved in community support and development, notably as Chair of Safe in Tees Valley, a position he still holds, and Chair of Tees Valley Community Foundation from 1996.</p> <p data-bbox="1478 416 1998 555">He and his wife Sheila live in North Yorkshire where, through their own charitable Trust, they are keen supporters of the community and culture - especially classical music, both being long term patrons of the Ryedale Classical Music Festival.</p> <p data-bbox="1478 592 1998 815">Tony and Sheila have built a named endowment fund within Tees Valley Community Foundation as a way of supporting the community in which they spent most of their working lives, and they are keen to help groups who work to address social deprivation, support young people to achieve in education and to become the next generation of leaders in their community and working lives.</p>
 <p data-bbox="235 1134 398 1158">Richard Harpin</p>	<p data-bbox="636 855 1153 994">Richard Harpin is founder and CEO, of HomeServe, which he started in 1993 in collaboration with South Staffordshire Water. In 2004, HomeServe demerged and is listed independently as a FTSE 250 company in the Support Services Sector.</p> <p data-bbox="636 1054 1153 1134">He lives near York and was reported often to commute by helicopter to HomeServe's head office in Walsall.</p>	<p data-bbox="1180 855 1451 967">In the 2021 Sunday Times Rich List Richard Harpin's estimated wealth rose significantly to £627m</p>	<p data-bbox="1478 855 1998 1198">Richard Harpin set up The Enterprise Trust, a charitable organization, to support and encourage entrepreneurs. All proceeds from the sale of his book, "A Mind for Business," authored by Michael Heatley, goes to the trust. He is a Member of the Apprenticeship Ambassadors Network, which encourages school leavers to take up a formal apprenticeship, to help fill the skills gap. In 2010, he donated £50,000 to help launch an "Entrepreneurship Badge," an initiative of the Scout Association where to gain the badge, the scouts must present a robust business idea to a panel.</p> <p data-bbox="1478 1230 1921 1254">He is an Enterprise Fellow of the Prince's Trust.</p>



Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="232 632 394 659">Michael Hogan</p>	<p data-bbox="636 240 1160 379">Michael Hogan is a Co-founder and Non-Executive Chairman of engineering and construction company, Esh Group, based in Durham. It was formed when his company Deerness Fencing merged with Lumsden & Carroll Group.</p>	<p data-bbox="1178 240 1420 323">He is likely to be a HNWI individual through his ownership of Esh Group</p>	<p data-bbox="1473 240 1991 293">Michael Hogan is a director of St Cuthbert's Care and a trustee of Esh Foundation.</p>
 <p data-bbox="232 1086 427 1114">Sir Moir Lockhead</p>	<p data-bbox="636 695 1160 1299">Sir Moir is an entrepreneur and a veteran of the public transport industry; began his career in the transport industry as an apprentice mechanic at United Autos in Darlington. At the age of 19, he started working as a Freightier for Tarmac but shortly after, came back to the public transport business as a Management Foreman at the Darlington bus depot. Between 1969 and 1979, he served as an Engineer at Tyne and Wear Buses and in 1979, moved to Glasgow to serve as the Chief Engineer of the city's bus and underground network and, in 1985, moved to Aberdeen to serve as the General Manager of Grampian Regional Transport. His foresight led a management buy-out of the company in 1989, followed by the stock market flotation in 1994, which were the two significant decisions that led the transformation of Grampian Regional Transport into a global company that is known today as FirstGroup, where he was the founder and served as the CEO from 1989 until his retirement in 2010. Sir Moir and his wife appear to live in Banchory, Scotland.</p>	<p data-bbox="1178 695 1397 778">Believed to be a HNWI individual through his business roles.</p>	<p data-bbox="1473 695 1995 863">Sir Moir Lockhead is reported to be passionate about engineering. He is a former Chairman of the National Trust for Scotland and also served as a Court Member, Honorary Chairman, Senior Governor and Vice Chairman of the University of Aberdeen.</p>

Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="232 523 591 576">John George Lumsden, known as Jack Lumsden</p>	<p data-bbox="636 240 1144 411">Jack Lumsden is a Co-founder and director of engineering and construction company, Esh Group, based in Durham. Tony Carroll and Jack Lumsden formed Lumsden & Carroll Group which was later merged with Michael Hogan's Deerness Fencing to form Esh Group.</p>	<p data-bbox="1178 240 1447 325">He is likely to be a HNW individual through his ownership of Esh Group</p>	<p data-bbox="1473 240 1973 325">Jack Lumsden is Regional Chairman of the Civil Engineering Contractors Association (CECA), and a trustee of Esh Foundation.</p>
 <p data-bbox="232 928 367 954">Stuart Monk</p>	<p data-bbox="636 616 1144 700">Stuart Monk is owner of Stockton-based property firm Jomast, which he founded in 1971, and is involved in leisure, office and residential projects.</p>	<p data-bbox="1178 616 1447 727">The wealth of Stuart Monk and family is estimated at £170m (Sunday Times Rich list 2020)</p>	<p data-bbox="1473 616 1973 815">In addition to his primary business , Stuart Monk served as a director of The Globe Stockton Foundation, which aimed to support the redevelopment of the Stockton Globe Theatre in Stockton on Tees. The Council took over the redevelopment after costs escalated substantially, and it is due to reopen in September 2021.</p>



Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 632 562 683">Alastair (pictured) and Michael Powell</p>	<p data-bbox="636 240 1137 379">Alastair and Michael Powell are the owners of Cleveland Cable Company in Middlesbrough. The brothers rarely speak publicly and enjoy a low-profile when compared with some of the region's other magnates.</p> <p data-bbox="636 416 1155 523">Their business employs 300 at Middlesbrough's Riverside Park and also has bases in Dublin and Dubai. Their other financial interests include The Keys nightclub in Yarm.</p> <p data-bbox="636 531 1155 756">In 1978, they co-founded Cleveland Cable Company and developed it into one of the foremost suppliers of electric cables and accessories in the United Kingdom. The company now also has a property portfolio of over 130 properties to let across the North East and North Yorkshire regions of England, as well as in areas such as Milton Keynes, London and Bristol, England.</p>	<p data-bbox="1180 240 1442 347">The brothers' wealth was estimated at £535m by the Sunday Times Rich list in 2020.</p>	<p data-bbox="1478 240 2002 320">The Powells have donated large sums to charity and Alastair Powell was recognised for his generosity with a Teesside Hero Award in 2018.</p> <p data-bbox="1478 357 2002 582">In February 2018, through Cleveland Cable Company and Mistell, the brothers donated more than £20k to the Butterwick Hospice in Stockton on Tees. Previously, Cleveland Cable Company reportedly gave more than £40,000 to charity. Alastair Powell and Cleveland Cable Company are also reported to be the largest supporters of the Middlesbrough and Teesside Philanthropic Foundation.</p>
 <p data-bbox="235 1094 412 1118">John Reece MBE</p>	<p data-bbox="636 799 1155 1257">Chairman of the Reece Group. The son of Dr Alan Reece, one of the North East's most successful businessmen. John worked with Alan in Soil Machine Dynamics (SMD), one of the very first university spin-out businesses; the company invented a sub-sea plough used widely in oil, gas and telecommunications pipelines. He ran SMD for several years until he sold it; he then became Chairman of Pearson Engineering, also a family business. The Reece Group today includes core firms Responsive and Pearson as well as pothole solutions firm Velocity, Pipe Coil Technology and Reece Innovation, a new division set up to explore and exploit new opportunities. The firm also has sizeable stakes in health operation QHS and Gosforth-based food packaging processors CRL.</p>	<p data-bbox="1180 799 1442 959">John Reece sold SMD for an 8-figure sum when he was 47. The Reece Group continues to be very successful and is still a family business.</p>	<p data-bbox="1478 799 2002 906">The Reece Group businesses, Reece Foundation and the LGA Foundation, the personal charity of chairman John Reece MBE and his wife Sue, have donated over £15m to initiatives across the region.</p>

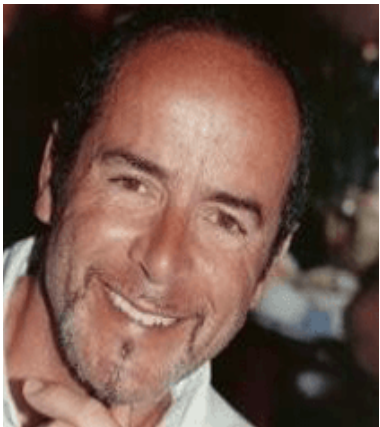

Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 675 488 699">Ilan Rennison and family</p>	<p data-bbox="638 240 1158 379">Ilan Rennison is Chairman of family-owned Stockton-on-Tees based LJJ, which is a mechanical and electrical contractor. For the 2019 year, the company had a turnover of c£67m and pre-tax profit of over £4m.</p>	<p data-bbox="1180 240 1453 323">The family is likely to be HNWI through its ownership of LJJ.</p>	<p data-bbox="1476 240 1977 352">LJJ has previously been a temporary sponsor of Middlesbrough Football Club shirts and has sponsored a professional golfer. LJJ are a corporate partner of Teesside Hospice.</p>
 <p data-bbox="235 1153 405 1177">Jonathan Ruffer</p>	<p data-bbox="638 735 1158 818">Jonathan Ruffer is originally from Stokesley and made his fortune in financial investment, co-founding Ruffer Management.</p> <p data-bbox="638 852 1122 935">Mr Ruffer owned just over half of the Ruffer investment business until 2018, when he donated 35% of it to his charity.</p>	<p data-bbox="1180 735 1417 847">Jonathan Ruffer's wealth was estimated at £159m (Sunday Times Rich List 2020)</p>	<p data-bbox="1476 735 1995 818">Jonathan Ruffer is a leading philanthropist and known for his role in the regeneration of Auckland Castle and the wider Auckland Project.</p> <p data-bbox="1476 852 1986 991">The transfer of £271m to his charity, which is funding the regeneration of Bishop Auckland, together with additional charitable spending means that Jonathan Ruffer has given away more than two thirds of his wealth.</p>


Name	Biography	Wealth and influence	Charitable activities
 <p data-bbox="235 722 474 751">David Soley and family</p>	<p data-bbox="636 240 1153 411">David Soley is the Chairman of beverage company, Camerons, which is based in Hartlepool, and which produces beers, lagers and wines. It also operates as Camerons Brewery. It owns a chain of pubs, largely in Northern England, called 'The Head of Steam'. Chris Soley is CEO of the group.</p>	<p data-bbox="1180 240 1453 323">The family is likely to be HNW through its ownership of Camerons.</p>	
 <p data-bbox="235 1118 427 1147">Peter Stephenson</p>	<p data-bbox="636 788 1144 986">Peter Stephenson owns the Billingham-based demolition and marine decommissioning business, Able UK, which has more than 6000 acres of land, including five sites on the River Tees and two on the Humber, housing ports, dry docks, logistics centres, waste management facilities and decommissioning services.</p>	<p data-bbox="1180 788 1449 927">Peter Stephenson and his family's wealth was estimated at £489m in 2020 by the Sunday Times Rich List.</p>	<p data-bbox="1473 788 1995 871">Able UK is the main sponsor of Scunthorpe University Technical College (UTC) and sponsors three teachers through the charity Teach First.</p>


Name	Biography	Wealth and influence	Charitable activities
 <p>Mark Stephenson</p>	<p>Mark Stephenson is the CEO and Director of furniture distribution company, Danesmoor Holdings, based in Newton Aycliffe. It describes itself as the UK's largest independent agency operating in the furniture market.</p>	<p>In 2019, Danesmoor had a turnover of c£70m and operating profit of £1.5m. Mark Stephenson owns more than 75% of the company.</p>	<p>Mark Stephenson has also served as a trustee of a Military WAGS choir and of Hurworth House School Charitable Trust. Mark is a long term support of Help for Heroes, and was awarded their 'Hero Award' in 2016 as well as Challenge Event Of The Year at the national Business Charity Awards for Blood Sweat and Gears, an endurance cycling challenge he led which raised £314k for Help for Heroes.</p>
 <p>Sir Peter Vardy</p>	<p>Sir Peter Vardy DL is a businessman from Houghton-le-Spring in Sunderland. His business interests have been mainly in the automotive retail business; he took over the business set up by his father Reg Vardy in 1923 and helped the company reach the top ranks of European motor retailers with over 6,000 employees in the UK and a turnover of £1.7bn.</p>	<p>In the Sunday Times Rich List 2009 ranking of the wealthiest people in the United Kingdom, he was placed 388th, with an estimated fortune of £140 million.</p>	<p>The Peter Vardy Foundation was created as a way of distributing 10% of the profits from Peter Vardy Limited to good causes. It exists to improve the lives of vulnerable children and young people both locally and abroad.</p> <p>In 2015, both he and his wife, Lady Margaret Vardy, received the Beacon Award for Philanthropy for Impact and Dedication.</p>



2. HIGH NET WORTH AND INFLUENTIAL INDIVIDUALS WITH INTEREST IN RAILWAYS


Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 721 371 746">Sir David Bell</p>	<p data-bbox="638 327 1158 582">Sir David Bell joined the Financial Times in 1972 and rose to senior management positions of Managing Editor, Advertisement and Marketing Director, CEO and in 1996, he became the Chairman of Financial Times. In the same year he was also appointed as an Executive Director for People at Pearson. In 2009, Bell retired as an Executive Director for People at Pearson and from Chairmanship of Financial Times. He is a non-executive director of The Economist.</p>	<p data-bbox="1176 327 1449 464">Sir David Bell is a former Chairman of the London Transport Museum and is a member of the Patrons Circle.</p>	<p data-bbox="1467 327 2002 496">Sir David is involved in numerous charities (e.g. he was Chairman of the Millennium Bridge Trust; has been a trustee of Sadler's Wells, the Esmée Fairbairn Foundation, a Council member of the National Theatre and of Roehampton University. He is also trustee of the Bell Family Charitable Trust.</p>
 <p data-bbox="235 1181 427 1206">Roger Daltrey CBE</p>	<p data-bbox="638 786 1140 812">Co-founder and lead singer of rock band, The Who</p>	<p data-bbox="1176 786 1453 1129">Roger Daltrey is known as a rail enthusiast and a keen railway modeller. In a 2014 interview, he said: "Britain forgets that we invented the railway and it conquered the world. The railway was the first thing to open up the world in a big way for trade. We invented it, and we should be proud of that."</p> <p data-bbox="1176 1161 1404 1299">In 2016 he officially opened the new Dungeness station on the Romney Hythe and Dymchurch Railway.</p>	<p data-bbox="1467 786 1977 868">Roger Daltrey was one of a group of enthusiasts supporting the Ashford International Model Railway Information Centre (Aimrec).</p> <p data-bbox="1467 900 1995 954">Estimates of his wealth vary, but he is undoubtedly an HNW individual.</p>



Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 692 389 719">Garcia Hanson</p>	<p data-bbox="638 256 1158 395">Garcia Hanson, who grew up in Yorkshire, is Managing Director of DCRail (Devon and Cornwall Railways Ltd) a freight operating company, and a director of freight company Hanson Hall Rail Services Solutions.</p>	<p data-bbox="1176 256 1453 339">Garcia Hanson is a member of the Patrons Circle of the London Transport Museum.</p>	<p data-bbox="1471 256 1554 280">See left.</p>
 <p data-bbox="235 1326 405 1353">Jeremy Hosking</p>	<p data-bbox="638 756 1113 866">Jeremy Hosking co-founded Marathon Asset Management. He remains a partner, and in 2018-19 was amongst the four recipients of a profit distribution of £127m.</p>	<p data-bbox="1176 756 1444 1098">Jeremy Hosking is a trustee of Royal Scot Locomotive and General Trust, which owns six steam locomotives, with the aim of preserving them and running them on both the main line and heritage railways. It aims to give practical experience through training volunteers in order to preserve skills.</p>	<p data-bbox="1471 756 1966 866">Jeremy Hosking's wealth was estimated at £385m in 2020 (Sunday Times Rich List). In recent years he has given over £1m to Vote Leave and pro-Brexit politicians.</p>



Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 783 392 810">Sir David Jason</p>	<p data-bbox="638 256 1160 339">Sir David is a renowned actor, famous for his roles in <i>Open All Hours</i>, <i>A Touch of Frost</i> and <i>Only Fools and Horses</i>.</p>	<p data-bbox="1178 256 1453 485">In 2020 it was reported that Sir David has a working model steam engine and track installed in his garden. He has previously presented a tv documentary series on planes, trains and automobiles.</p>	<p data-bbox="1471 256 1991 339">Spear's magazine estimates Sir David's wealth at c£7m, and the Daily Mail reports that he continues to earn over £1m a year.</p>



Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 619 452 644">Judy, Lady McAlpine</p>	<p data-bbox="638 256 1158 512">Lady McAlpine was the second wife of the late Sir William McAlpine, and in marrying him an earlier passion she held for vintage vehicles with her own first husband was rekindled. She is also passionate about education and helping aspiring young engineers to take up apprenticeships so that the store of knowledge and skills necessary to conserve our engineering heritage is itself conserved to be passed to future generations.</p>	<p data-bbox="1176 256 1453 427">Lady McAlpine is President of the National Transport Trust and a Patron of the Railway Heritage Trust, of which her late husband was founding Chairman.</p> <p data-bbox="1176 459 1444 1294">The late Sir William McAlpine had a life-long interest in railways, and had a private railway in the grounds of his home. He was also well-known for saving the locomotive 'Flying Scotsman': he repatriated it to the UK, overhauled it, and ran it on the main line for 23 years. He was also heavily involved in other locomotives and carriages, and retained a large private collection. Sir William served on both the Southern and the Great Western Advisory Boards of British Rail, was the Chairman of both the Dartmouth Steam Railway and River Boat Company and the Romney, Hythe & Dymchurch Light Railway. He was President of the Transport Trust, and was involved with many other preservation organisations.</p>	<p data-bbox="1471 256 1973 312">She is a donor to at least one other heritage railway (Mid Suffolk light railway)</p>

Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 647 371 671">Guy Monson</p>	<p data-bbox="638 256 1160 485">Guy Monson is Chief Investment Officer and Senior Partner of Sarasin & Partners LLP, and has over 35 years of investment experience having joined the company in 1984. has pioneered the use of thematic investment in the management of global equity portfolios and today leads the firm's global investment and markets strategy for a wide range of charitable, endowment and private clients.</p>	<p data-bbox="1178 256 1453 339">Guy Monson lists 'steam engines' as his recreation in his entry in 'Who's Who'</p>	<p data-bbox="1471 256 1998 427">Guy Monson is a trustee of the Invictus Games Foundation; a former trustee of The Royal Foundation of The Duke and Duchess of Cambridge and The Duke and Duchess of Sussex; a member of the London School of Economics Ideas Board and a Foundation Fellow of Lady Margaret Hall, Oxford University.</p>
 <p data-bbox="235 1206 412 1230">"Wick" Moorman</p>	<p data-bbox="638 711 1160 911">Charles Wickliffe "Wick" Moorman IV (born 1953) is an American businessman and railroader. He is currently a consultant with Amtrak, where he formerly served as president and CEO as well as co-CEO. Prior to his hiring by Amtrak, Wick Moorman served as chairman, president and CEO of Norfolk Southern Railway.</p>	<p data-bbox="1178 711 1453 938">Wick Moorman is a Stephenson Circle Patron of the National Railway Museum in York. He is also Chairman of the board of the Railroaders Memorial Museum, located in Altoona, Pennsylvania</p>	<p data-bbox="1471 711 1554 735">See left.</p>

Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="232 647 463 671">David Morgan MBE TD</p>	<p data-bbox="636 256 1155 485">David Morgan's initial involvement with preserved railways was as legal advisor, since he is a solicitor. He retired from practice at the end of February 2013. He served for 32 years in the Territorial Army, ending up with the rank of Lieutenant-Colonel. He was decorated with the MBE by the Queen in 2003 for his services "to transport preservation in the UK and Europe".</p>	<p data-bbox="1178 256 1451 743">David Morgan is Deputy President of the National Transport Trust and Founder President of the European Federation of Museum and Tourist Railways and the World Association of Tourist Trams and Trains. He served as Chairman of Heritage Railway Association until 1 June 2014, and is also Chairman of Great Central Railway Plc and Vice President of the West Somerset Railway and President of the North Norfolk Railway.</p> <p data-bbox="1178 778 1435 1118">David Morgan is also Chairman of the Maritime Heritage Trust and previously of Heritage Afloat, and Vice Chairman of the Cutty Sark Trust. He is Deputy President of the Transport Trust and a Committee Member of Europa Nostra Industrial and Engineering Heritage Committee.</p>	

Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 619 398 644">Geoff Mortimer</p>	<p data-bbox="638 256 1160 485">Geoff Mortimer is the owner and director of the civil engineering construction company, Construction Marine, which was founded in 1986. The Leeds-based company carries out work for large entities such as the Network Rail, British Waterways, British Rail and the Yorkshire Water. It specialises in river and coastal defence projects while also carrying out earthworks, drainage and building work.</p>	<p data-bbox="1178 256 1453 368">Construction Marine was recognised in the National Railway Heritage Awards in 2003, 2007, 2009 and 2011.</p>	<p data-bbox="1471 256 1966 282">Geoff Mortimer's wealth is estimated at over £25m.</p> <p data-bbox="1471 316 2002 399">Construction Marine provides support to local charities such as the Rotherham Street Kitchen and the Homeless Leeds Support Group.</p>
 <p data-bbox="235 1015 434 1040">Sir Gerry Robinson</p>	<p data-bbox="638 684 1160 999">Sir Gerry Robinson rose to become Managing Director of Grand Metropolitan's Contract Services division. Then in 1987 he led the UK's then largest management buy-out with the £163m purchase of the Division, subsequently renamed the Compass Group. The Compass Group was later floated on the London market. He joined Granada in October 1991 as Chief Executive and was Chairman from 1996 until 2001. He has also been Chairman of BSkyB PLC, ITN, Arts Council England, Allied Domecq PLC and Moto Hospitality Ltd.</p> <p data-bbox="638 1032 1160 1086">Sir Gerry was awarded a knighthood in the 2003 New Year's Honours for Services to the Arts and Business.</p>	<p data-bbox="1178 684 1453 999">Sir Gerry is a train enthusiast who established a narrow gauge railway running 4.5km in the grounds of his home in County Donegal, Oakfield Park, which is open to the public https://oakfieldpark.com/plan-your-visit/trains/. A steam train runs once a month and a diesel at other times.</p>	<p data-bbox="1471 684 1989 738">In 2011 Sir Gerry Robinson's wealth was estimated at EUR 42m</p>

Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p>Michael and Nicola Sacher</p>	<p>Michael and Nicola Sacher founded Mungo & Maud, dog and cat 'outfitters' in 2005. Michael Sacher previously worked for Marks & Spencer and Nicola Sacher's background is as a tv producer in the advertising industry.</p>	<p>Michael and Nicola Sacher are, via their charitable trust, Stephenson Circle Patrons of the National Railway Museum in York.</p>	<p>Through the Michael and Nicola Sacher Charitable Trust the couple have made donations to a range of causes, totalling over £500k over the last five years.</p>
 <p>Sir Rod Stewart CBE</p>	<p>Hugely successful singer, songwriter and producer, who has sold over 250 million records.</p>	<p>In 2019 Sir Rod featured on the cover of Railway Modeller, showing the model layout of a US city which he had worked on for 23 years. This was shipped back to the UK in 2021 in seven shipping containers, after Sir Rod relocated back to the UK.</p> <p>He is Patron of the B17 Steam Locomotive Trust, which aims to build a working replica B17 locomotive, costing over £3m.</p>	<p>in 2021, Sir Rod Stewart became patron of the B17 Steam Locomotive charity trust which aims to build a working replica of a B17 locomotive. In 2019 he donated £10k to help rebuild a model railway which had been destroyed by vandals.</p> <p>His wealth was estimated by the Sunday Times in 2021 at £215m.</p>

Name	Background	Evidence of interest in rail or transport heritage	Wealth and giving notes
 <p data-bbox="235 683 365 707">Phil Swallow</p>	<p data-bbox="638 256 1158 368">Phil Swallow is a non-executive director of the UK Home Office and a former partner in Accenture. He built his 30-year career at Accenture in IT systems design and complex international project turnaround.</p>	<p data-bbox="1176 256 1453 488">Phil Swallow is a Stephenson Circle Patron of the National Railway Museum in York. He owns a restored steam locomotive first dating from 1945, which is operational on the Severn Valley Railway.</p> <p data-bbox="1176 517 1444 628">Phil and Caroline Swallow are members of the Patrons Circle of the London Transport Museum.</p>	<p data-bbox="1471 256 1980 397">In addition to being a donor to the National Railway Museum, he holds a number of non-executive director positions including Rail Vehicle Engineering Ltd, London Transport Museum and Northern Ballet; and is a Trustee of Richmond Park Charitable Trust.</p>
 <p data-bbox="235 1157 448 1181">Pete Waterman OBE</p>	<p data-bbox="638 748 1126 888">Pete Waterman is known as one third of the successful music production and song-writing partnership, Stock Aitken Waterman and for his PWL label. He is described as the most successful producer-songwriter in British history.</p>	<p data-bbox="1176 748 1453 1265">Pete Waterman is a well-known rail enthusiast, both with an extensive collection of model railway sets, and ownership of a number of steam locomotives. He is a trustee of the Waterman Railway Heritage Trust, which owns a number of assets including historic locomotives. In 2016 he became a vice-president of the National Transport Trust, a UK charity dedicated to the preservation of the nation's transport heritage. In 2018 he became President of Peak Rail plc.</p>	<p data-bbox="1471 748 1989 831">In 2015 he auctioned around a tenth of his collection of railway models for more than £600,000, donating the funds to the Waterman Railway Heritage Trust.</p> <p data-bbox="1471 863 1928 887">He is President of the Railway Benevolent Fund.</p>

APPENDIX 4: COMPANIES

RESEARCH INTO POTENTIAL CORPORATE PARTNERS FOR FRIENDS OF STOCKTON & DARLINGTON RAILWAY

Background: Friends of the Stockton and Darlington Railway is seeking to identify potential corporate partners to contribute funding and/or volunteering.

The research has identified 24 companies local to the Stockton and Darlington Railway with evidence some or all of interest in the sector, strong geographical links to the project, charitable giving, volunteering and interest in promotion of STEM.

Sources: Companies House, press and media reports, organisational websites and annual reports.

Name	Turnover	Location	Principal activities	Evidence of charitable giving	Evidence of volunteering/ community engagement	Evidence of interest in promoting STEM
Stockton Castings	Unreported; net assets £2m. Subsidiary of Teesside Engineering Ltd, which had turnover of £20m in 2019.	Stockton (registered office Bishop Auckland)	Foundry exporting throughout Europe and into the USA.	None found directly. 100% of the share capital of Stockton Castings and of its parent company Teesside Engineering Ltd is owned by Robert Yorke, also a Labour Councillor. He has supported a range of local charities through his office via the Neighbourhood Budget Fund (an allocation of funds made to each Councillor to support community and voluntary projects within their area) including £50 to Friends of the S&DR for the BIG S&DR bridge restoration in 2018/19.	none found	none found
Close Thornton Solicitors	not reported	Darlington, Durham	Solicitors offering legal and property services to both private and commercial clients.	Adopted St Teresa's Hospice as a chosen charity in 2019. Participate in Make a Will Month for them as well as other fundraising.	None found	n/a

Name	Turnover	Location	Principal activities	Evidence of charitable giving	Evidence of volunteering/ community engagement	Evidence of interest in promoting STEM
Latimer Hinks	not reported	Darlington, Durham	Solicitors, founded in Darlington in 1892. Specialise in: Asset protection; Estate, wealth, tax and succession planning; Capacity; Farms and estates; Residential, commercial and agricultural property.	<p>“Our approach to CSR at Latimer Hinks reflects our belief that we have a responsibility to our community. As a long-standing Darlington business we are committed to recognising and responding to the needs of our community. We support charitable causes and community activities that promote diversity, tackle social isolation, support education and encourage sustainability.” They give via the Latimer Hinks Ingenious Fund (which is held as part of County Durham Community Fund) and through fund-raising activities organised by the team. Recent causes include Darlington & Bishop Auckland MRI Scanner Appeal (£11,500); Durham Cathedral (amount undisclosed).</p> <p>They also organise charity balls, recipients have included: St Teresa’s Hospice, Darlington & Bishop Auckland MRI Scanner Appeal, Josie’s Dragonfly Trust, Darlington Hippodrome, Family Help (Darlington), Pioneering Care Partnership, Daisy Chain Project (Teesside), First Stop (Darlington), Bridge Centre for Visual Arts, Upper Teesdale Agricultural Support Services, Herriot Hospice Care, Royal Agricultural Benevolent Association (R.A.B.I.), Skerne Park Youth & Community Centre, Just the Job, Daybreak, Teenage Cancer Trust, Haughton Residents Association, The Bridge (Richmond).</p>	In 2018 a four-strong team from the Latimer Hinks painted the interior of new premises for Age UK North Yorkshire and Darlington (NYD).	n/a

Name	Turnover	Location	Principal activities	Evidence of charitable giving	Evidence of volunteering/ community engagement	Evidence of interest in promoting STEM
Amazon	£278,000,000,000	Global company with distribution warehouse at Newton Aycliffe - qualifying location for charitable support, see right.	Online retail.	<p>Amazon states: "Amazon has been investing in the communities in which we operate for many years to provide funding to support small charities that provide local support. Individuals, teams and entire sites actively participate to raise funds for and deliver monetary donations to charities in their local community."</p> <p>They only make donations to charities that align with their theme of helping children and young people build their best and brightest futures. Giving is focused on projects in the local communities around our fulfilment centres, head office and development centres.</p> <p>Employees at each Amazon location are able to select the local charities and community organisations to which they wish to donate. Employees are invited to nominate charities, and the local Charity Committee then creates a shortlist of charities which employees vote on each month.</p>	As left.	Supported Inverclyde & District Battalion Boys Brigade with developing Science, Technology, Engineering and Maths skills through equipment for outdoor adventures and games.

Name	Turnover	Location	Principal activities	Evidence of charitable giving	Evidence of volunteering/ community engagement	Evidence of interest in promoting STEM
Hitachi Rail Europe	£868,000,000	Head office in London, major site at Newton Aycliffe	Hitachi Rail Europe Ltd., is a wholly owned subsidiary of Hitachi Europe, Ltd. and is headquartered in London, UK. Hitachi Rail Europe is a total railway system supplier offering rolling stock, traction equipment, signalling, traffic management systems, and maintenance depots.	Since 2012, Railway Children has been Hitachi's charity of choice and so far we've raised over £120k through different fundraising events. This has contributed to changing the lives of thousands of children in India, Africa and the UK.	The annual report states the company supports local communities where it works and is dedicated to retaining local skills to support regional economies.	With a focus on inspiring the next generation into a career in STEM, the company, as part of wider group initiatives, have partnered with Primary Engineer and Engineering Development Trust supporting programmes for children across the UK.
Cummins Ltd	£1,757,000,000	Darlington, Durham	Part of global manufacturing company Cummins Inc. Designs, manufactures and distributes diesel and natural gas engines and other powertrain related components. The land around the Cummins Engine Factory site was one of 20 national post-war gardens and landscapes added in 2020 to the Register of Parks and Gardens, part of the National Heritage List for England.	The Cummins Foundation support employees engage in their local communities focused on education in community around future workforce needs, and equality of opportunity.	Website states "Cummins strives to become an integral part of each community that it resides in. One way it accomplishes this is through the countless hours of community service and involvement their employees log each year."	Run a programme aimed at bringing candidates with STEM degrees back into work after 2+ year career break.

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Morrisons	£17,000,000,000	Closest branch is Morton Park, Darlington	Supermarket chain.	<p>The Morrisons Foundation supports charities making a positive difference in local communities across England, Scotland and Wales. They award grants for charity projects and match fund the money that Morrisons colleagues raise for their chosen charities.</p> <p>Morrisons grant funding supports charities delivering projects which help to improve people's lives. From support groups to children's hospitals and homeless shelters to hospices, our grants provide vital funding for good causes across England, Scotland and Wales.</p>	Every store has a Community Champion. Volunteering seems to be focussed around fundraising on behalf of local causes.	n/a
Cleveland Bridge	£47,957,000	Darlington, Durham	Cleveland Bridge is a world-leading steel fabricator and constructor of bridges and complex structures	Active in support of a number of chosen charities, running a number of events throughout the year to support those charities eg sponsored runs, employee golf days, lieu day raffles. Chosen charity for 2020 is Zoe's place, an independent charity offering palliative, respite and end of life care to babies and infants aged from birth to five years.	Plays a pivotal role within the local engineering community, assisting on projects such as restoring a footbridge for a local heritage railway or providing apprentices and support to the A1 steam locomotive trust on the construction of a new locomotive. Since 2016 has partnered with Darlington Cares to provide employee volunteering opportunities in the local community.	Participate in STEM events throughout the year supporting schools and helping students see what it would be like to have a role within engineering.
Sabre Rail	Unreported - external online estimates range from £4m-£10m	Newton Aycliffe	The UK's leading independent rail component overhaul specialists, with a wealth of experience in mainline, high speed, freight, metro and light rail services.	None found	None found	None found

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3M	£23,000,000,000	Global HQ is in Minnesota, USA; plant local to S&DR is Newton Aycliffe.	Global science-based technology company. Fore areas are safety and industrial; healthcare; transportation and electronics; consumer. Listed as a World's Most Ethical Company for eight years in succession. Describes Newton Aycliffe site as "a flagship manufacturing site for 3M in the UK".	Gave \$87.m in 2020, 20% more than 2019 and the highest in the company's history - this was partly as a response to Covid. Gives in two ways: (1) Corporate giving focusses on supporting and promoting access to STEM subjects. (2) The 3M Foundation focusses grants to improve the quality of life in underserved families; increase access to youth development programs for underrepresented children; provide access to vibrant and diverse art opportunities. Also offer employee match giving both matching donations and also giving a cash contribution to a charity for every hour a 3M employee volunteers there.	Strong emphasis on employee volunteering worldwide. Runs annual 3M Global Volunteer Day, which recently saw 3M United Kingdom volunteers complete conservation and beautification projects for local nonprofits and schools. 193,535 volunteer hours logged globally in 2020.	Funds 3M Young Scientist Challenge in the US for middle school children. 3M's Science at Home provides teachers and parents with simple science experiments for kids that can be conducted at home by students ages 6-12. Regular partner of British Science Week eg in 2018, 3M hosted a careers open evening for more than 100 female Year 7/8 pupils and their parents.
Nissan Motor Manufacturing (UK)	£6,260,659,000			Nissan Global foundation's activities are focused in Japan.		

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DB Arriva	£4,883,763,000	Sunderland	Leading provider of passenger transport services in Europe delivering 2.1 billion passenger journeys a year.	Partnership with Foundation of Light, charity of Sunderland FC. Also raised over £260k for NHS Charities Together last year through donating overpayments of fares.	Within its individual business functions, the Arriva group encourages employees to volunteer for charities and projects in the local community. During the financial year to Dec 2020 Covid made this difficult, but in previous years activities have included supporting schools with career advice, fundraising and other projects.	Work with schools helps to spread awareness of road safety and the environmental benefits of public transport among pupils in local communities across Europe.
The Go-Ahead Group PLC	£3,807,100,000	Registered address in Newcastle. Go Ahead North East office in Gateshead.	One of the UK's leading public transport companies, connecting people to their communities across our bus and rail networks.	Annual report states contributions include cash donations, the value of time spent volunteering, gifts in-kind such as travel tickets, as well contributions made through salaries sacrifice schemes. In 2020 they contributed over £1m to local communities. At Group level, Go-Ahead supports Transaid and the Campaign to End Loneliness through donations, volunteering, joint consumer and industry campaigns and sharing of expertise.	As left. Also active members of the Place Leadership Team with Business in the Community, looking at how businesses, local authorities and non-governmental organisations can come together to improve the health and wellbeing of local communities across the country. Several local managing directors are now sitting on Town Deal boards which have been set up to distribute the Government's Town Deal funding.	n/a

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Northumbrian Water Group	£907,600,000	Pity Me, Durham	Water supply.	NWG has four community funds with their local Community Foundations, including County Durham Community Foundation.	Encourages employees to support community and charitable organisations through employee volunteering scheme 'Just an hour'. This scheme allows employees to give a minimum of 15 hours every year to support causes close to their hearts.	Range of activities offered at the Innovation Festival including those that are specifically aimed at inspiring young people to consider careers related to science, technology, engineering, art or maths (STEAM)..
Redde Northgate PLC	£745,470,000	Darlington, Durham	Vehicle hire. During 2020 the Northgate and Redde businesses combined to create a leading integrated mobility solutions and automotive services business of scale.	Website states "As well as being a contributor to the economies we operate in, we encourage our colleagues to support charities that are close to their hearts." No evidence found of direct corporate giving.	As left.	Website states aim "to promote green technology and initiatives to protect our environment." No other details found.

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Gestamp Tallent	£482,383,000	Newton Aycliffe	International group (HQ in Spain) dedicated to the design, development and manufacture of metal automotive components.	Annual Report for Gestamp Tallent Ltd at Newton Aycliffe site states "The Directors regularly approved donations to local charities, the most significant of which was the funding for a minibus for a local college."	Annual Report notes that "the Company's workforce is primarily derived from the local community...The Directors believe that greater awareness amongst the community will help to improve the Company's reputation with the local community and therefore increase the number of quality applications for positions within the Company".	Gestamp Summer Camp is a seed project that seeks to promote the passion for cars amongst children, as well as developing STEM competencies (Science, Technology, Entrepreneurship and Maths).
Mitsubishi Chemical UK Ltd (formerly Lucite International)	£312,000,000	Stockton on Tees	Part of Mitsubishi Chemical, the world's largest producer of Methacrylates – 'the building block of all acrylics'.	Annual report states "the Company operates a programme in which employees nominate local charities for donations".	None specific.	Strong apprenticeship programme at their Billingham site.

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Magnet Ltd	£390,092,000	Darlington, Durham	Kitchen suppliers.	Magnet supports the National Autistic Society at corporate level. Have run social media campaigns asking readers to nominate a charity to receive a free kitchen. In 2015 they ran a local giving programme, where a total of 169 charities, each representing a local Magnet Trade store, were challenged to describe what makes them a 'Magnet of the community', with £10,000 split regionally between the ten most voted for causes. An additional £1,000 was awarded to the public's overall favourite. In 2020 Rixonway Kitchens merged with Magnet: the press release stated Rixonway Kitchens is strongly rooted in the local community and will continue to work closely with local charities and organisations, in particular with HM Prison Service, an initiative which was set up to help reduce unemployment by teaching prisoners new skills prior to being released.		n/a

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Venator Group	£341,163,000	Stockton on Tees	Leading global chemical company dedicated to the development and manufacture of titanium dioxide (TiO ₂) pigments and performance additives.	Venator operates three funds: Bright Ideas Fund, Community Fund, Together Fund. All three aim to support local groups and organisations in the North East of England by funding projects that promote teamwork and innovation. Bright Ideas funds projects that inspire learning in the fields of science, technology, engineering and maths across the North East. Community funds groups and organisations that inspire teamwork and innovation, including grassroots sports clubs, Ofsted registered education providers and other community-based and not-for-profit groups. Together funds projects that support teamwork. Venator also supports the High Tide Foundation – a charity connecting education and industry in the Tees Valley – offering work experience and apprenticeships.	In May 2017, apprentices volunteered to support renovation works at the Daisy Chain Project, a local charity that supports families affected by autism in the Tees Valley.	<p>In the North East, initiatives for young people include Venator's apprenticeship programme; university partnerships and collaboration; sponsorship of research programmes, work experience, and graduate job opportunities.</p> <p>Working with Business in the Community (BITC), employees have taken part in a range of careers events at local schools.</p>

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HC-One	£309,003,000	Darlington, Durham	Care Homes	Annual report states “the Group achieves positive community integration through developing strong links with local groups, churches, sheltered housing and assisted living developments, schools and charities”. The HC-One Foundation is a registered charity with the aim of relieving the effects of financial hardship, sickness and poor health amongst elderly people. It has granted £100k and £150k to the Silver Line, a free helpline for elderly people.	Use volunteers themselves within care home settings; no evidence found of employees acting as volunteers.	n/a
Husqvarna UK	£230,951,000	Newton Aycliffe	Swedish manufacturer of outdoor power products including chainsaws, trimmers, brushcutters, cultivators, garden tractors, and mowers.	Matched Ulm community donations, providing 200,000 Euros for helping 100,000 people gain access to clean water. Also has partnership with Unicef also focussed on clean water.	Community involvement aim is to connect people with nature, the Group aims to protect biodiversity, promote healthier lifestyles and create more resilient communities.	None found.
Esh Holdings	£196,038,000	Bowburn, Durham	Leading civil engineering and built environment group of companies operating across the north east.	Esh Communities is our local community grant scheme which funds hundreds of community projects every year. Projects must be located in the vicinity of an Esh Construction scheme. Currently they must also help their local community recover from the COVID-19 Pandemic.	Work in partnership with our clients to support their local community by organising opportunities workforce volunteering. Almost all volunteering includes at least 1 specialist with relevant knowledge of the volunteering opportunity and £500 budget for materials, specialist clothing or equipment.	Support activities for young people at STEM at the Innovation Festival. Also provide primary schools with award-winning Get into STEM kits.

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Handelsbanken	£3,650,000,000	Darlington, Durham	Swedish bank with over 200 branches in the UK. Emphasis on private wealth management	Frequent media reports of staff at various branches of Handelsbanken across the UK fundraising for charities eg "A team of seven cyclists from Handelsbanken Nottingham City Gate have very generously presented Nottingham Hospitals Charity with a cheque for £10,504.53 raised by taking on a mammoth cycle from London to Paris in the summer." Another example is the Norwich branch which holds the Handelsbanken Swedish Charity Ball with Norfolk Community Foundation.	As left	n/a
Darlington Building Society	not reported	Darlington, Durham	Building society	Committed to giving 5% of net profits in grants every year to 2025; these grants are chosen by Building Society members and disbursed by the County Durham Community Fund. Grants totalling £60k in 2021 (£80k in 2018).	Community Strategy has 4 key aims: Sharing profits – through the annual five per cent pledge Sharing time – through volunteering and fundraising Sharing knowledge – through financial education and career enhancement Sharing space – by making facilities available to community groups Reported 111 volunteering days in 2018 annual report.	n/a



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