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# 1964

## John Moores Foundation: a retrospective

**John Moores Foundation was established in December 1964 and this retrospective looks back over 50 years of grant-making activity. How do you reflect something of the enormous wealth of experience that John Moores Foundation has built up as a result of being a major supporter of community work and voluntary effort for five decades?**

What can do justice to the product of often relatively small grants which may

- enable an advice service to help those in desperate need gain access to the benefits to which they are due?
- support those with child care responsibilities to become involved in adult education?
- encourage different communities to become involved in activities which lead to greater mutual understanding and trust?

The benefits of such grant aid can be boundless and the ripple effect can continue for years. So any retrospective can only scratch the surface of JMF's grant making activities. Rather than trying to present a detailed account of its work, the retrospective will look at how

- JMF's grant-making has changed in response to the needs and circumstances of the community and voluntary sector
- JMF strengthened the support provided beyond grant-making to improving their monitoring and evaluation arrangements in 1995 and by employing a Community Development Worker in 2000, in recognition that groups often need information and advice alongside or instead of financial support
- JMF responded to the troubles in Northern Ireland by establishing a grants programme there in 1981 and supported education and training projects in South Africa for over 30 years.

Whilst avoiding detailed reference to individual items of grant aid, information has been brought together to illustrate something of the scale of the financial support which JMF has provided over the period. Some brief reflections from some of those who have had contact with JMF in different capacities over the years, provide a window into the real value and impact of JMF's grant making activity.

Three further notes merit mention at this stage.

Firstly the Foreword by Eric Midwinter refers to the support which the Liverpool Education Priority Area project received from JMF way back in 1969. Eric's account is an excellent precursor to what follows since it succinctly and graphically illustrates some of the qualities which have come to characterise JMF over the years: the keenness to respond to identified community needs and the degree of personal involvement from John and Jane.

Secondly the retrospective concludes with some material from the 50th Anniversary Conference held by JMF in November 2014. As with this retrospective, so the Conference could only provide a limited opportunity for some of those involved with or who have benefitted from JMF support over the years to come together to mark the achievement. Nevertheless those present clearly valued the chance to meet old friends and make new contacts.

The workshops ensured that any nostalgia was generally limited to the intervening breaks and lunchtime whilst Ken Livingstone's speech covered a period of political and social change contemporaneous with the period of much of JMF's activities.

And finally, for my own part, I have known of and worked with JMF though my role as Community Development and Equality Officer with Liverpool City Council over the period from 1975 to 2000, subsequently as Chair of the Merseyside

Probation Board and presently through certain voluntary sector roles. Throughout this period, I have seen at first hand the huge impact which even small amounts of financial support can have when used effectively. Also on occasion, we cooperated closely together to ensure an initiative came to fruition which might otherwise have been beyond our own capacity. Applications from smaller community groups run by volunteers were favoured over those from better resourced city-wide groups, as JMF sought to direct its funds to support services and facilities to those in greatest need. JMF has generally conducted its' business discretely, shunning publicity, often preferring only to be the "anonymous donor".

*JMF's achievements owe much to the personal involvement, direction and commitment of two people: John and Jane Moores.*

On behalf of all those who have benefitted from JMF's work over the past 50 years, I record their sincere appreciation and trust the Foundation will continue for many years to come.

My personal thanks all those who have so willingly contributed their time and effort to this retrospective. I hope the result does JMF justice.



**Nigel Mellor**  
November 2015

## John and Jane Moores: The Model Benefactors

**I recall vividly my first ever meeting with John Moores and even more vividly the impact he and his generous-spirited wife, Jane, had on the work we were trying to do in Liverpool between 1968 and 1975. It was a government backed national scheme of action-research aimed at making education more community-friendly in areas of social dislocation. My team organised the Liverpool branch of the project, basing our work in and around schools in Liverpool 7 and 8.**

John was a quiet listener and a quick actor. He heard the argument I made about the lack of pre-school provision in this area which was, at the time, badly served by public facilities. Almost before I knew it, we had arrived at an agreement that he would finance the appointment of a pre-school adviser. We resolved very grandly to call the appointee the Moores Pre-school Fellow; after all, why shouldn't the under-fives of the inner city have a 'Fellowship' bestowed on them as well as the nearby University? I must confess I liked that conceit so much that when I was involved in the establishment of the University of the Third Age, a project based on groups of older people self-mobilising in their local communities, I persuaded the Rank Foundation to fund a similar post, the Rank U3A Fellowship, as national organiser.

The wise and sympathetic Eleanor Connor was duly appointed and before long the Liverpool Educational Priority Area Playgroups Association (abbreviated to the non-maternal EPA PA) was formed, a mutually supportive body involving local parents with training, premises, equipment and so on.

It was intriguing to note that at early meetings when community officers were anxious to see constitutions and

legal trappings develop, interest waned; when we got down to money and practicalities, it waxed. A salutary lesson: the theory of community developers allowing the spontaneous uprising of communal action, waiting, as it were, for some scouse Joan of Arc to appear waving the pre-school banner, was well-intentioned but unhelpful. Sitting there, in our suits and in jobs, we were looked to for a proper contribution. At this point we estimated that only 1000 of the 6500 nursery age children in the area were having any kind of pre-school education. Soon mother-orientated playgroups began to sprout.

And the John Moores Foundation was a highly personal benefactor. Many fund-givers, for all their worthwhile-ness, are a trifle faceless. Not so with this one. John served selflessly and sagaciously on the Steering Committee that covered the whole of the programme being developed in schools and in adult education, while Jane was the ever-kindly and friendly doyenne of the EPA PA.



The fulcrum of the pre-school activities and the great recruiter for the playgroups was the Paddington Playmobile. This was a retired corporation double-decker bus, fitted out and painted by pupils of Paddington Comprehensive School, plus bus conductors' hats for the clientele, which visited different locations of the area for one hour fifty-nine minutes a session (two hours – and you had to have a toilet; an amiable neighbour was usually called upon to provide the children with this part of the service)

Launched by Councillor Lady Margaret Simey with a suitably diluted bottle of welfare orange, its first stop was at Martha's, a lady who was keen to start a play group but couldn't find accommodation. The bus went there three afternoons a week and became known as Martha's bus. Soon it had a full, well, timetable is probably the right word. Getting groups together and giving them at least a few hours experience was a marvellous boost towards conversion into a regular group. Within eighteen months there were fourteen playbuses nationwide. Soon there was a National Playbus Association; on the tenth anniversary of the launch I attended the annual Playbus conference, with dozens of playbuses on parade. They gave my four year old daughter a large rosette with 'Daddy Did It First' inscribed; mine said 'I Did It First'.

The Playmobile was a wondrous poster-boy for the whole of our project. It soon had its own thick newspaper cuttings file and had been on television more than a dozen times. It was rumoured that it refused to speak to the other buses as it proceeded on its stately way with a smug expression on its bonnet.

All this and more was possible not only because of the funding of the Moores Foundation but because of the spirit in which it was given and in the supportive manner in which

the giving was followed up with such affectionate gusto by Jane and John. Overall the project did much to enliven the discussion about education in urban areas, especially in the pre-school and primary fields. For example, the need to involve and communicate with parents effectively in all kind of user-friendly ways is something that is now taken for granted in almost all schools – rather different from one response I received in the early days of our project from one young teacher: 'we don't want those bloody dirty, smelly mothers in here with us...'

Above all, the atmosphere was optimistic, cheerful, buzzing, busy, energetic and convivial...much of that was down to the fact that Jane and John Moores were an optimistic, cheerful, buzzing, busy, energetic and convivial couple.



**Eric Midwinter**

Director of the Liverpool Educational Priority Area Project (1968-75)  
Co-founder of the University of the Third Age.

# The founding of the Trust

It is important here to describe briefly how John Moores Junior came to be able to endow the eponymous Trust with such wealth over a sustained period of time.

## Sir John Moores CBE

John Moores Senior set up Littlewoods Football Pools in the 1930s to which were later added the Littlewoods High Street Shops and Mail Order enterprises. John Moores Senior was one of the great entrepreneurs and private sector businessmen the country has known. He died, Sir John Moores CBE Freeman of the City of Liverpool, in 1993, having been variously honoured for his achievements.

Thereafter, the Littlewoods Organisation continued to be run as a successful privately owned family business until into the new Millennium, when it was sold to the Barclay Brothers for £750m.

## John Moores Junior CBE, DL

John Moores Junior was born in 1928, the eldest son of Sir John and Ruby Moores. After being educated at Eton College, Berkshire, and spending two years at Syracuse University in the USA, he joined the Littlewoods Organisation in 1946. He became the Executive Director and Deputy Chairman of the Organisation in 1968 and Chaired the Littlewoods Organisation Equal Opportunities Strategy Committee from the mid-1960s through until the mid-1990s. He resigned from Littlewoods in 1996 to spend time breeding Aberdeen Angus Cattle on his farm in Formby, which he and his wife Jane had started in the mid-1960s. He later became President of the Aberdeen Angus Cattle Society and in March 2012 he was the first of its members to be awarded the Society's Hugh Watson Lifetime Achievement Award.

John was also involved in many other aspects of the life of the City of Liverpool and the wider area of Merseyside including a term as Chancellor of Liverpool John Moores University from 1994 after serving as First Pro Vice Chancellor and Chairman of the Board of Governors from 1992. He chaired the local Council for Voluntary Service from the mid-1970s until 1986 and helped to establish South Liverpool Personnel in 1971 (an organisation promoting employment and training opportunities primarily for disadvantaged black people).

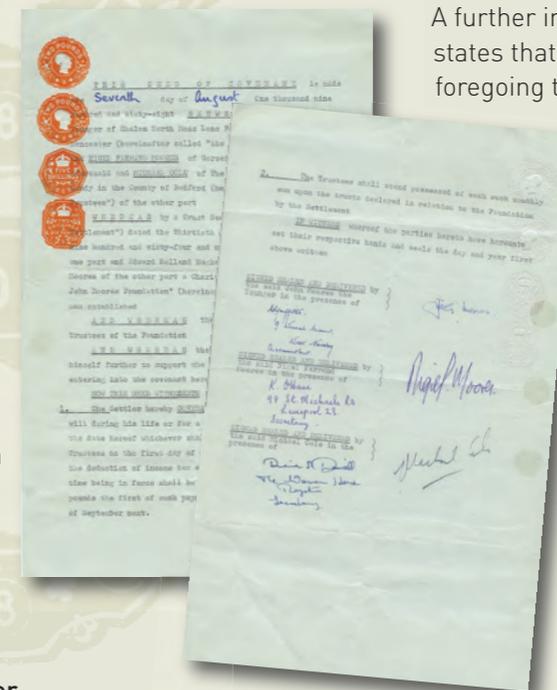
John was awarded a CBE in 1993 and made a Freeman of the City of Liverpool. He died on May 22nd 2012.

## The Trust Deed

The Deed is dated 30th December 1964 and records that "the Settlor (John Moores the Younger) is desirous of establishing a charitable trust to be known as the John Moores Foundation and to that end has transferred and paid to the Trustees a sum of one hundred pounds."

The original Trust Deed states that the Trustees could support all or any of the following purposes

- "The raising of the artistic taste of the public whether in relation to music drama opera painting, sculpture, or otherwise in connection with the fine arts
- The promotion of education in the fine arts
- The promotion of academic education
- The promotion of Christian education
- The provision of facilities for recreation or other leisure-time occupation
- The helping of the young the old and the needy PROVIDED ALWAYS that nothing in this Clause contained shall create any trust affecting the Trust Fund or impose upon the Trustees any legal or equitable obligation or modify the duty of the Trustees to apply the whole of the Trust Fund and the income thereof for charitable purposes."



A further interesting provision states that, "In the execution of the foregoing trusts the Trustees shall

have the power to expend not only the income from the Trust Fund but also from time to time or at any time to expend all or any part of the capital thereof".

These various clauses from the Trust Deed illustrate the breadth of scope available to the Trustees in considering and making grants.

As grant making activity grew over subsequent years, the Trustees refined and amended the kind of work and activities they wanted to support and the Trust benefitted significantly from further funds from its Settlor.

It is perhaps indicative of the rather more relaxed ways things were operated at the time that it was not until nearly 3 years later that Solicitors acting for the Foundation enquired as to whether the Trust had met the requirement to register with the Charity Commission. Since this had not happened, a formal letter was written and the forms duly returned from the Commission's London office.

# The early days...



## Bronte Youth and Community Centre

The “Bronte”, as it was affectionately known, is in Trowbridge Street near to Brownlow Hill close to the City Centre, the Metropolitan Cathedral and Liverpool University. The Centre was originally established in 1969 in older premises which were soon replaced in 1972 when a brand new building was erected as part of a national Boy’s Club initiative with support from Sir John Moores.

John (Jnr) was appointed to the board of Trustees of the Bronte and, with his wife Jane, became very involved in its day to day running. Recognising that the notion of Boys only clubs was becoming a little dated, John and Jane, and Teddy Gold who ran the club, initiated the transformation of the Bronte into a centre for all of the community.

The Centre provided both Junior and Senior Youth Clubs on three and four nights a week respectively, ran a regular 4 week summer play scheme together with other trips, outings and camps.





The work and activities provided by the Bronte organisation were funded by two principle sources, Liverpool City Council, through its Youth Service budget and by the John Moores Foundation. In the 1970s, the Centre also ran a bar which provided a source of income to offset the expenditure on activities etc. However this closed some time later due to the difficulty in running youth activities in close proximity to licensed premises.

By the 1990s the Bronte's funding support needs were beginning to strain the JMF when the Centre made an urgent request that the Foundation increase its level of support to cover the shortfall in the budget for the year ahead. The request promoted a personal response from John Moores himself to the Treasurer which pointed out that the population of the Bronte area had over recent years decreased by about two thirds (as a consequence of the redevelopments taking place in the area following the demolition of some of the walk up flats etc.), so JMF grant support was to be reduced by the same two thirds. John went on to suggest that the Bronte should look to other sources of funds and ended with the advice that they "must cut their clothes according to the now available cloth". Good advice coming from the owner of one of the biggest high street clothes retailers!

The JMF Trust Officer was also getting increasingly concerned about the degree to which the Bronte seemed reliant on the Foundation for support. This position was strengthened when in 1999 the Trust agreed that it would

not fund groups for more than 3 years since it wanted to fund new, small groups and other in-house developments.

The Bronte was successful in raising some European funding to improve the facilities for young people at the Centre (a Home Work Centre and Study Centre)

which also attracted a contribution from Riverside Housing, a local registered social landlord which was involved in the redevelopment and refurbishment of property in the area.

The JMF Community Groups Development Worker became involved with the organisation shortly after their appointment in 2000. As a result of the discussions which took place, the Bronte became a Company Limited by Guarantee and subsequently a Business Plan was produced to guide future work and activities for the period 2001-04.

The passage of time has brought major physical changes to the area served by the Bronte Centre and these developments have had an impact on the Bronte organisation and its activities.

JMF funding of the Bronte over such a long period of time caused problems of dependency for both parties. The Bronte perhaps relied more heavily on a single charitable source for a substantial period of time (albeit receiving some funds from the LEA), and subsequently found it quite difficult to adjust to finding other sources of funding. The Foundation found similar difficulties when trying to reduce the Bronte's dependence on grant aid and was concerned not to create other such dependencies in the future. It subsequently made several changes to its policy in the light of this.

*“ The role of philanthropy in our society should be recognised and celebrated and the contribution of the John Moores Foundation held as an example of how private money can underpin the local economy and change the life chances of generations of vulnerable individuals and groups. ”*



# Formby Hall

Formby Hall is a listed building (possibly 15th century) with surrounding grounds set in countryside on the outskirts of Formby. In 1967, the 35 bedroom premises were leased to John Moores in person for a period of 20 years 1 month and 1 day, who in turn assigned them to the Formby Hall Trust, to provide holidays and short term recreational breaks for children and young people who would benefit from spending some time in a countryside setting.



Initially there was a strong link with the Bronte though this subsequently weakened as more groups from the Inner City and others used the facilities which Formby Hall had to offer. Perhaps due to the particular individuals involved or as a reflection of the aspirations and idealism of those times, the records reflect what would now be regarded as interminable discourses on esoteric philosophical and political themes, including the distribution of power and how this might be shared more equitably, theoretical aspects of Community Development and how the resources of Formby Hall and the Bronte could be accessed by people from disadvantaged communities.

Early meetings to discuss the way Formby Hall might operate were attended by the Head of the Liverpool Children's Department and senior people from the University. On one occasion even the Council Leader is recorded to have given his apology for not being able to attend - such was the pulling power of the event!



The Trust Deed was registered with the Charity Commission on 16 April 1968. The three Trustees were all local Solicitors. The Trust was able to pay for equipment, maintenance, repair insurance, reconstruction and general upkeep of the Centre and all outgoings and staffing. The Trust could also assist with the beneficiaries' costs of residence, pay travel costs and do anything else to help the beneficiaries enjoy the facilities.



The Hall was used extensively by young people from Liverpool and other surrounding Districts in Merseyside and brought together youth and youth workers from across the City who forged links that persisted beyond their time at the Hall.

Over the years, the fabric of the building took some hard wear and tear. The listed building status only made this situation more difficult to deal with. The Trust increasingly felt that its vital resources were being diverted away from supporting its core activities, the provision of holidays and activities for young people, into maintaining the bricks and mortar of the building. The final straw appears to have been

the requirement to install means of escape in case of fire. The Trustees wanted to provide this external to the building, but its listed status prevented this approach. The only solution acceptable to the "authorities" required an internal secondary staircase which as a consequence meant the sacrifice of three bedrooms. After much debate, the decision was made to close the Hall. As if to rub salt in the wounds problems arose over the liability for dilapidations which had not been properly accounted for when the building was initially leased. Eventually John Moores had to step in to settle the matter to avoid costly litigation.

## The Foundation's Grant making activities

**Having operated for the early part of its existence on a rather casual basis, the Foundation appointed its first Grants Officer, Linda Lazenby, in 1980, and made its first grants to Northern Ireland the following year.**

The first policy document produced by JMF highlighted five key aspects of its policy namely:

- **That whilst a national trust the JMF concentrates its funding on projects in the more disadvantaged areas of Merseyside and Northern Ireland**
- **JMF aims to provide grant aid to groups to whom funds are not readily available**
- **Trustees prefer to help small or new groups rather than long established, large or national organisations**
- **Trustees wish to see evidence of a working equal opportunities policy in existing projects and the intention to practice such a policy in new projects**
- **The Foundation is unlikely to fund projects which have popular appeal**

Within these parameters JMF indicated it would consider applications from projects working in the following areas: women, black people, advice and information to alleviate poverty, race gender and disability awareness, elderly people, children and young people, second chance learning, training for people in voluntary sector organisations, HIV/AIDS/Drugs, and Community groups. Additional guidance for work in Northern Ireland expected any group funded by JMF to have cross community contact and to develop and maintain those links.

At that time the Trust had an annual income of about £400,000 nearly half of which was already promised to projects from decisions made in previous years. Grants varied in size with most being between £100 and £5,000.

JMF did not make grants for buildings or building work, the arts, academic research, or the environment as well as a number of other causes (e.g. medicine, church activities and employment creation).

Some years later in response to the arrival of new refugees in Merseyside and the outcome of the Macpherson Report (Stephen Lawrence Inquiry) which described how community groups would have to respond differently to meet new, special and existing needs, JMF took the decision to introduce experimental funding to provide support in two main areas of concern:

### People in Crisis

Projects that increase the participation of refugees in full community life would be given priority and grants would only be given for work directly involving:

- **emergency support to incoming refugees including the provision and development of specialist legal advice on resettlement.**
- **local projects working towards the integration of refugees in community life including basic education, training, health, cultural, general social welfare, and schemes that target excluded people within the refugee community as well as initiatives that enable them to meet their own needs.**



## Co-operative Working/Trust Building

Projects that address the 'causes' would be a priority while less emphasis would be given to the 'symptoms'. To address this concern grants would be given for work directly involving:

- **local trust building initiatives to encourage co-operation and joint working between different community and voluntary groups – projects which break down barriers.**
- **support for non-black community groups who are developing and implementing culturally sensitive policies.**
- **the provision of advice, information and assistance with individual advocacy.**

By the end of the 1990s further refinement of JMF's funding practice saw support for carers, unemployed people, child care provision and alternative /complementary therapy included in the list of examples of projects eligible for funding. Perhaps a sign of the wider economic situation, the income at the disposal of the Trustees had increased to £750,000 of which 10% was set aside for grants to Northern Ireland.

Through the first decade of the new Millennium, JMF continued to refine the categories of work it was willing to support through its grant giving to reflect changing circumstances (for example, People in Crisis was re-termed Work with Refugees and Alternative/Complementary Therapies was subsumed under Grass Roots Social Health).

However the key emphasis of JMF throughout its 50 year life has been to concentrate its limited funds on support for small, grass-roots and volunteer driven organisations.



JMF has shown particular support for those groups that find it more than usually difficult to raise money. In line with their long standing commitment to equal opportunities, JMF has supported services and activities which aim to counter racism, sexism or discrimination of any kind.

JMF has also supported projects which aimed to break down barriers, to encourage co-operation and joint working between different community and voluntary groups and across local boundaries. Grants have been given for local trust-building initiatives where there have been tensions or misunderstandings within or between communities.

In addition to the provision of financial support JMF has described itself as an "enabling funder" and has wanted to help groups achieve their targets and outcomes in their own way. Groups have been given help with setting up monitoring and evaluation systems that best meet their needs, capacity etc.

If a group received a grant from the Foundation, additional support may have been offered to the group by the JMF Community Groups Development Worker.

## JMF in Northern Ireland

JMF has been actively involved in supporting a wide variety of community and voluntary sector activity in Northern Ireland. The Foundation funding policy sought to emphasise the importance of inclusivity and work to promote increased understanding and cooperation between all sections of the community. Whilst regular support was provided in some instances, many of the groups applying to JMF did so for the first time. Grants made were generally up to £5,000, though many were smaller and demonstrated the fact that often a quite modest amount of money can make a real difference when used effectively at the local level.

The JMF process for considering applications for grant aid from groups in Northern Ireland involved a degree of devolution, inasmuch as an Advisory Group, formed of locally based individuals with a knowledge of the voluntary sector in Northern Ireland, first looked at the applications and made appropriate comment. The Advisory Group was also able to reject those that did not meet the criteria or were otherwise weak. Their recommendations were then passed to the JMF Trustees for final consideration and formal approval. Although the process took longer, it was considered preferable to benefit from the local knowledge and perspective provided by the Advisory Group.

The variety of work supported by JMF over the years is impressive both in its geographical spread and in the nature of the activities provided. Groups serving neighbourhoods in Belfast and Derry received support alongside organisations working in isolated rural communities. Mention is made here of some of the activities which were supported to give a flavour of the rich tapestry:



- **Counselling and personal development for people with mental health needs**
- **Home-based educational and child development for parents and carers of children 0-5 years**
- **Community projects in rural areas lacking facilities providing senior citizens club, youth club, women's learning and fitness groups and acting as avenue for outreach**
- **English language classes for Muslim women to combat isolation and promote access to mainstream public services.**
- **Involving young people in sexual health programmes**
- **Work to combat isolation in rural areas poorly served with public transport by providing workshops/ training courses and other craft-based activities**
- **Support groups for parents and families of drug misusers to help them tackle the isolation and stigma experienced**
- **Advice and Community Resource and Drop-in Centres located in areas of severe social and economic disadvantage where there is evidence that the service is accessible to all.**

## A view from Northern Ireland...

John Moores Foundation funding has made a significant difference to community work on the ground in Northern Ireland. Speaking specifically for the (former Derry City) Council area many groups doing vital community development work in areas of need, those working with limited or no staffing and reliant on volunteering in particular have been supported to continue good work in our local estates and neighbourhoods. Our local Black and Minority Ethnic groups – most of whom were only set up within the last 10 years, have been greatly encouraged by receiving funding which has



enabled them to develop their capacity and uplift the spirits of their often isolated communities. One of the key differences from government funding is that with John Moores Foundation funding, groups don't have to spend all the money up front and then claim it back – this retrospective approach by many other government funders makes it virtually impossible for smaller, newer groups to aspire to bigger achievements in service delivery – no matter what their capacity. This barrier doesn't exist with John Moores Foundation funding, and groups greatly appreciate that.

John Moores Foundation funding has made a significant difference to community work on the ground in Northern Ireland. Many groups doing vital community development work in areas of need, those working with limited or no staffing and reliant on volunteering in particular have been supported to continue good work in our local estates and neighbourhoods. I hope that the fund will continue to support good work across Northern Ireland for many years to come and would add my thanks to all those who work so hard to run the fund. It is deeply appreciated.

## JMF in South Africa

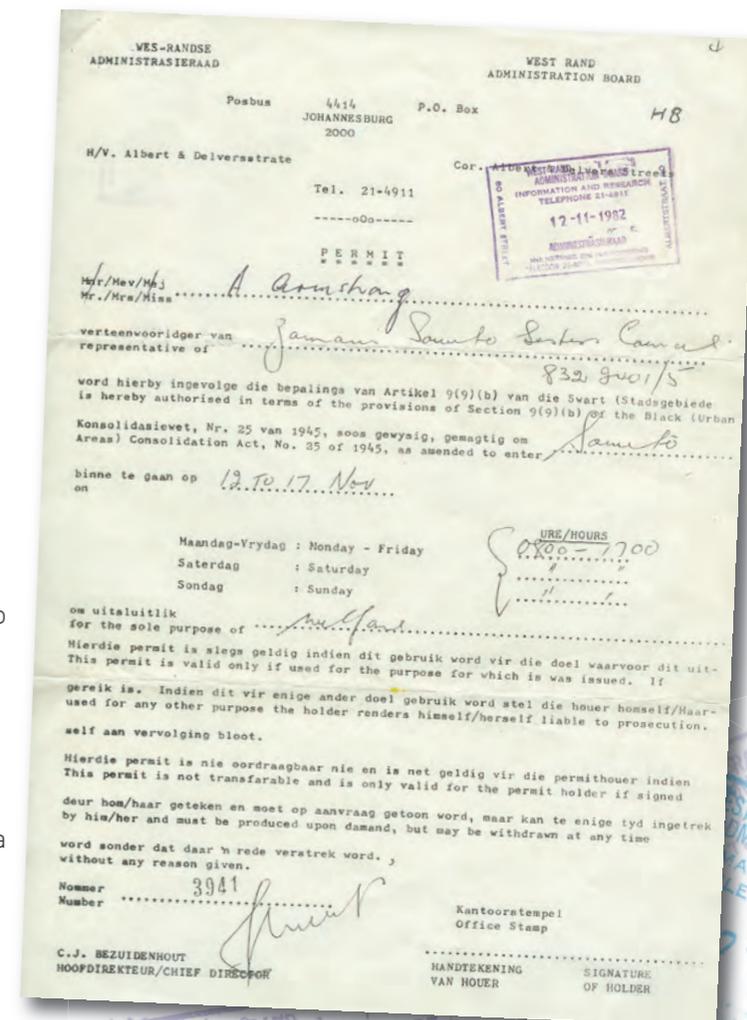
JMF became involved in South Africa during the apartheid era. This involvement is inextricably intertwined with the personal lives of both John and Jane Moores and therefore the brief resume provided here extends far beyond the narrow confines of JMF support to describe how, initially John, deepened his knowledge and understanding of race issues in South Africa and how this subsequently led both Jane and John almost imperceptibly to involvement in one community project and then another over a period of nearly four decades!

In the early 1970s John was given a copy of the book "Honorary White" by E R Braithwaite which describes the brutality, oppression and courage he witnessed as a black man granted honorary white status during a 6 week visit to Apartheid South Africa. This book had a significant impact on John and Jane and led to their sending a donation to the YWCA women mentioned in the book around the time of the 1976 Soweto Uprising.

Later an article in the "Guardian" mentioned these women, now formed into the Maggie Mugaba Trust by Betty Wolpert in memory of her Black "nanny" - Ellen Kuzwayo, Chair, Maggie Mokgata and Elizabeth Mpenyana were all Trustees. John and Jane contacted Betty and she invited them to go to South Africa with her in 1981, where they also met the women who were working with her to make the film "Awake from Mourning", concerning the response of women to the Soweto Uprising.

John and Jane also learned of the work of the Zamani Soweto Sisters Council which was active in the Orlando area of Soweto from the very early 1980s. JMF first provided a contribution towards the costs involved in setting up self-help groups which focussed around sewing, knitting and

garment-making involving unemployed and self-employed women. However, the women found reading patterns and understanding measurements difficult and this limited their potential. In 1983, partly funded by JMF, John and Jane invited Maggie Mokgata and another teacher to Liverpool to see literacy programmes where they met Protasia Torkington, a South African resident in Liverpool.



JMF also used its contacts and knowledge of UK based funding sources to help marshal support for the new Zamani Training Centre for Craft groups which at that time was estimated to cost about £140,000. Eventually sufficient funds were raised and the building was opened in March 1987. JMF has provided further regular contributions over the years towards training and project costs and general running expenses.

Over these years Maggie Mokgata, Elizabeth Mpenyana and others made several visits to the UK and to projects in Liverpool, whilst Jane Moores visited groups in South Africa. In 1989 Jane was taken by Maggie and Elizabeth to meet Craft groups in the North of the country. Jane, Maggie and Lizzie founded the Women's Education Fund for Southern Africa to combat these problems to which JMF donated at intervals.



In 1990 a group of 12 women representing Craft Groups from various parts of South Africa came to Liverpool for "Training the Trainers" programmes organised by Wirral Metropolitan College and Liverpool City College. JMF made a donation towards the costs involved.

In 1995, Maggie Mokgata's husband, James, passed away and the hospital in which he died was very overcrowded. That experience of the South African health care system led Jane to contact Protasia Torkington to see if there was something that a relatively small amount of money could do to improve the health provision in the community. The upshot was that Protasia Torkington spent a year based at Cape Town University researching the community health needs in South Africa. Pro's research (published as "Community Health Needs in South Africa" Ashgate Publishing 2000) led to much deliberating and negotiation within the community until it was agreed to build a Health Clinic at Isingolweni near Port Shepstone in Kwa Zulu Natal.



Contributions from various sources, including JMF, enabled the Centre to be completed. Further development of the Clinic has seen the addition of improved facilities for Aids/HIV Counselling services and a Maternity Wing.

Whilst not funded directly with JMF funds, it should not go without mention that during the course of her visits to see the progress of the Clinic, Jane met a Development Worker employed by the local Municipality who was involved with Child Care provision.

She told Jane about the fact that there were no first reader books for children written in their own language. This sparked another thought in Jane's fertile mind and she set about writing a range of stories suitable for children in crèches and nurseries and learning to read for the first time. After much further effort, copies of several first readers were rolling off the printing press operating from a portacabin in the Clinic grounds.



## A view from South Africa...

### "Before the clinic was built"

The area was one of the many served by a mobile clinic. Nurses came here once a month and patients waited in long queues in the open air in the rain or scorching sun. Consultation by nurses was done in small makeshift tents behind the ambulance which was filled with drugs and equipment for other checks e.g. ante-natal, immunisation, and sometimes delivery. People travelled long distances to get to this open-air clinic irrespective of how ill they were. Some people died during the long journey. Sometimes the queues were so long that some people went home without being seen by the nurses.

### After the clinic was built.

The area now has a clinic in which nurses examine and treat patients.

Patients start coming early in the morning and there is a big veranda where they can sit and wait their turn. They all live nearby and the clinic has some taxis that can be used. When it started, like all clinics, it opened 5 days a week from 9am – 4pm. The community which was very involved from the start asked for extended opening hours. Now it's open for 24 hrs a day and 7 days a week. The same community has pushed for a maternity unit and now Thembalesizwe Clinic has one!

All the above would not have happened without the financial support of the Foundation. Many people still remember how things were and say how wonderful the present service is."

## JMF and Equality of Opportunity

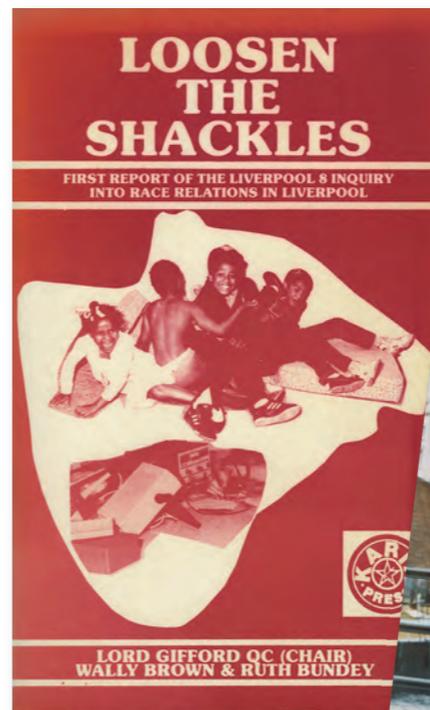
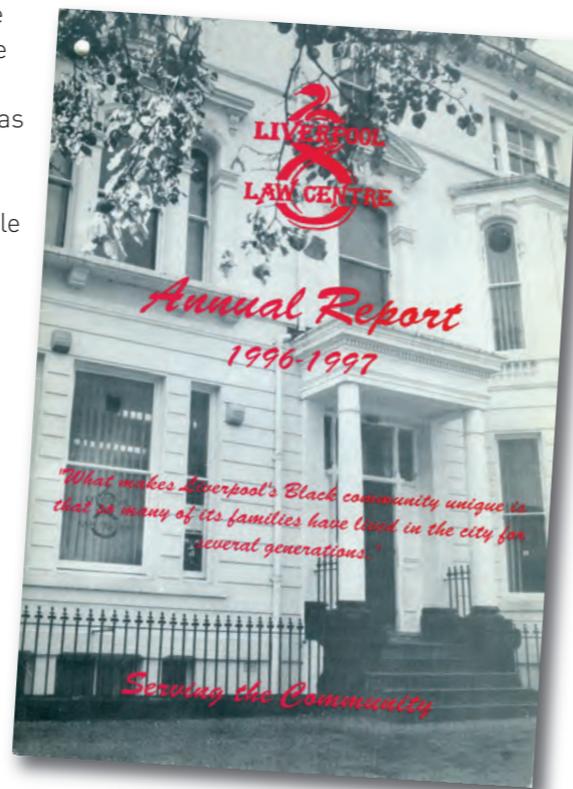
The Foundation has provided significant support over the past decades to improve and develop greater equality of opportunity. Advice to organisations considering submitting an application to JMF has stated:

“ Trustees wish to see evidence of a working equal opportunities policy in existing projects and an intention to practice such a policy in new projects. ”

The support provided by the Foundation towards charitable activities to tackle discrimination, promote equality of opportunity and improved services and facilities for disadvantaged groups derives in no small measure from the commitment and priority given to equality of opportunity by both John and Jane Moores personally.

This commitment has been evident over many years and is witnessed, for example, by the fact John was at the forefront of work to promote positive action and other measures to increase representation by black people in the workforce of Littlewoods and its related companies. This work extended way beyond the bounds of his own companies to encouraging other private and public sector organisations to examine their recruitment practices and adopt equal opportunity policies backed up by effective implementation. It is no accident therefore that significant amounts of grant aid were similarly allocated over the years to support groups working to promote equality of opportunity and tackle discrimination in different ways.

JMF funding was crucial in enabling the Liverpool 8 Law Centre to be set up in the aftermath of the 1981 riots in the City. Revenue support from JMF continued when other sources of funding proved difficult to access. Some years earlier, John had been personally involved when the Martin Luther King Foundation joined forces with JMF to establish Liverpool Personnel (later to become South Liverpool Personnel) to provide advice and support particularly to unemployed black people. It was also in the early 1980s that JMF responded positively to an initiative to improve access for women into sectors of industry where they were under represented (such as electronics, technology and computing) with grant aid to the Women's Technology Scheme. At the time John was chair of the Information Technology Centre (ITEC) based in the Granby area of Liverpool which was providing training and support to enable black people to access employment in new technology.



In line with its recognition of the difficulties faced by refugees, asylum seekers and migrants, JMF has, for example, given significant support to the Somali Community in the City over the past 30 years. Initially JMF tried to respond positively to requests from groups representing different interests in the Somali community but as time passed and pressure on Trust funds increased, efforts were made to encourage greater cooperation and coordination of activities run by the various organisations and through support of the Somali Umbrella Group. More recently JMF has responded to the needs of migrants from Eastern Europe and those fleeing countries experiencing turmoil elsewhere.

Further examples of JMF promotion of equality of opportunity work is seen in the support for the Greenbank Project which has provided a range of education, training, employment, housing and sports facilities for disabled people from its base in Greenbank Lane and at other locations in Smithdown Road and in the South Docks area at different times. In addition, the Granby Community Mental Health Group provides a range of services and support to local people with mental health needs.



## JMF Support for Women and Families

The Foundation provided support to a wide range of projects offering support for women and carers as well as providing children's activities. JMF recognised the significant barriers that those with caring responsibilities faced in trying to access learning and employment opportunities. Assistance was therefore provided to groups offering parenting skills, mutual support/self-help, families in crisis and childcare. Given the potential scale of after-school clubs and playgroups etc. these were only able to be funded where there was a family support element involved. This activity preceded the introduction of mainstream Children's centres and Surestart projects.

The JMF relationship with Kinship Carers illustrates well the way in which many community and voluntary groups develop over time and have often benefitted from the advice and support of the Foundation's Community Groups Development Worker alongside any financial support which may be offered. Kinship Carers started life as PADA-Parents against Drug Abuse- in the early 1980's. The initial aim was to support family members affected by substance misuse. However, as the project developed, it became apparent that many families accessing the service were also grandparents raising their grandchildren due to parental substance misuse without any financial or emotional support. This raised issues around their needs and those of their grandchildren. The change of name to Kinship Carers better reflects their primary role.



This approach chimed in well with the Foundation's desire to support grass roots work with families. The Community Groups Development Worker has also been able to offer practical advice and support over a sustained period, when needed.

The Strand Crèche was set up in 1992 after the tragic murder of James Bulger to campaign for child care facilities to be available in the Strand Shopping Centre, Bootle. After spending two years trying unsuccessfully to persuade the Shopping Centre to open such a facility, the people involved decided to do it themselves! Since the initial group did not have charitable status, their approach to the JMF could not be supported, but a personal donation from John and Jane helped to get the Crèche off the ground.

Play groups were not funded under JMF policy, but child care provision to enable parents to take part in adult education or training courses was eligible. JMF offered some financial support whilst the Community Groups Development Worker provided advice on business planning and helped to advocate on the Crèche's behalf in trying to persuade local retail outlets in the Strand Centre that they should support the facility. Negotiations

were conducted with the owners of the Strand on the basis that the Crèche costs could be included in the Service Charge payable by all tenants.



Modest assistance from JMF has also enabled the Huyton Family Parish Welfare group to provide a range of courses and activities for parents/carers and children which have helped to build and strengthen relationships, confidence and self-esteem for those involved. Again the Community Groups Development Worker was able to provide support, information and assistance when required. The group described the value of this role in their own way as, "I have always known that I can pick up the phone if I need some advice and even though the funding finished, they have always offered the same level of support giving recommendations on best practices and further funding

**“ So much more than a grant-giver! JMF really knows about the challenging and changing lives of communities in its areas of benefit. All its staff and trustees over the years have sought out first hand what's happening on the ground and what new issues a very diverse range of communities new and old are struggling with. ”**

sources amongst other things. If anyone was thinking of looking at applying for funding, I couldn't recommend them higher."

JMF has also sought to encourage projects which build confidence and mutual support amongst women in recognition that such activities often develop to take in other broader concerns and campaign issues. Recent JMF support at the early stages enabled the Tomorrows Women Wirral to become established.



## JMF and Grass-roots Community Work

The description of JMF's intentions in supporting neighbourhood community groups well reflects John's own strong preferences in this respect. Priority has been given to small, grass-roots and volunteer- driven organisations, self-help groups, tenants' associations, and community action rather than long-established groups. Groups that found it more than usually difficult to raise money have been preferred to the larger, well established organisations. In line with JMF's commitment to equal opportunities, projects were also expected to counter racism, sexism or discrimination of any kind. Funding has also been provided to support fresh approaches and new ideas to respond to unmet needs in the community, and the Trust has tried to encourage co-operation and joint working between different community and voluntary groups, on occasion by supporting local trust-building initiatives.

JMF supported the Orrell Park and District Community Association initially with grant aid towards their secretarial services. By the 1980s, the Association had increased the range of activities being provided significantly to include a youth club, unemployed club, keep fit, play group, mums and toddlers, bingo and Children's Crèche.

The organisation was then able to secure funds from the National Lottery Community Fund to improve its facilities and JMF helped to bridge a shortfall that arose during the implementation of these works. Further support was provided by the JMF Community Development Worker in preparing a Business Plan for 2002-05 and in trying to identify further sources of potential grant aid. Despite several attempts to raise revenue funding from the Lottery, the organisation was not successful.

Elsewhere in Liverpool, JMF took a proactive approach towards the community needs. Norris Green is a large estate of about 8,000 properties, over 5,000 of which were Local Authority houses. The area experienced high rates of youth unemployment and at times, 70% of households were dependent on Income Support.

The Norris Green Community Federation started life as the Norris Green Community Council in 1987 with the object of working to improve the housing conditions and facilities for children and young people. JMF provided several grants towards the start- up costs and to enable the employment of a Community Worker. This support encouraged further contributions from other funders. However after a period of National Lottery funding the Federation faced real difficulty in trying to raise funds to meet its commitments and responsibilities. The City Council agreed a small contribution which met some of the running costs for a short period but lack of funds restricted the level of activity which could be sustained.

Progress on the housing renewal works had also stalled badly and this contributed to a widespread feeling of frustration and disillusionment amongst residents. The Federation had to scale its activities right back in order to survive.

Following the demise of the Federation, JMF agreed to support some community-led research to find out the views of local residents on the key issues and concerns for the area. Three Church based groups came together to work with other groups in the area. JMF, along with the Lloyds TSB Foundation, agreed to support the employment of a Community Coordinator post to help drive forward these aims.

Various community activities were organised including an Awards Ceremony held at Aintree Race Course, along with the Norris Green Unites Carnival, whilst some progress was made with extending the availability of activities for young children. Several inter-generational activities were

developed (based on the arts, dance and outings for example).

A successful application to the Big Lottery- Reaching Communities secured further funding and an application to the Tudor Trust for the "Count us in Project" provided training opportunities for residents to enable them to develop their skills and interest in community work activities.

Over the years JMF has recognised the value and importance of training for voluntary and community organisations to enhance the skills particularly of management committee members, but also of staff, to enable them to operate more effectively and improve the quality of the service they offer. Funding has also been made available for the recruitment and training of volunteers. More recently those involved in the management of community based Credit Unions have benefitted from this support.

# Meet the Orrell Park living success story!

DEEP in the heart of north Liverpool, lies a living success story of what can be achieved by a community if they put their minds to it.

The Orrell Park Community Centre, although founded by a group of residents as far back as 1974, is only now beginning to realise its potential as a valued amenity for the young and old of the area.

A few years ago the

by Ian Swinnerton

enquiries on anything from the poll tax to debt problems.

Such is the centre's reputation that people come from far and wide seeking help.

Workers at the community centre face a constant battle to expand their activities while balancing their finances at the same time.

empty room is to be converted into a recording studio. All this within the next 12 months!

But Eileen and George are realistic enough to know that the volunteer help will

not last forever. Expansion requires more full-time staff, and staff cost money. Unless the authorities see fit to help, they have to hope that the shoestring doesn't snap.

● The Orrell Park Community Centre is open from Monday to Friday every week. For more details of the activities on offer contact George Shield or Eileen Thompson on 523 3808.

6 Weekly Star, Thursday, June 14, 1990



## JMF and Information and Advice services

JMF support for information and advice services owed much to Jane and John's preference for locally-based, resident-led initiatives which would benefit disadvantaged communities across the City and beyond. Projects providing welfare rights advice or other advice and information services to alleviate poverty were prioritised. The reference in JMF's advice to applicants that, "we will not normally fund those which are part of a national network", indicated that funding for CABx was not a priority. Groups were encouraged however to hold or to be working towards a nationally-recognised quality standard in advice-giving.

JMF was a major supporter of the Merseyside Information and Advice Project which operated in the Anfield/Breckfield/Everton area of the City for nearly 20 years. Many people living in some of the most disadvantaged areas of the City of Liverpool benefitted from the information and advice provided by MIAP over this period. The demands made on the Trustees over the years by their involvement in this initiative were significant, requiring at times, personal attendance at meetings and responding to urgent appeals for help and advice. JMF also supported the two independent Law Centres in the City (Liverpool 8 and Vauxhall Community Law and Information Centre) for some years.

## JMF and Youth work

Reference has been made above to the substantial involvement over a lengthy period of time which JMF had with Formby Hall and the Bronte Centre, both of which made significant provision for youth work within their wider range of activities

Throughout the ensuing years, JMF sought to steer a delicate path in providing support for Youth Work activities across the City and the wider area of Merseyside. It was conscious of and careful to avoid straying into the legitimate territory of the Local Authority, whilst being made only too aware of the great variety of need which existed across the area from the many applications it received. JMF therefore

phrased its policy statement to give priority to projects run by local groups in disadvantaged areas which provided facilities or opportunities for children and young people (up to the age of 21), e.g. play-schemes, youth clubs, and detached youth work. JMF particularly welcomed projects which were, or were working towards being, user-led.

Brunswick Youth Club in Bootle was formed in 1947 and received support on a number of occasions over the years but perhaps most crucially in the mid-1990s when the Youth Club was struggling to keep the After School Club going. Subsequent success in raising funds from Children in Need and other sources helped secure the Centre's future.



## Success verdict on Vauxhall law centre

By Val Woan

VAUXHALL Community Law centre has returned a successful verdict on its first year of making legal advice available to everyone.

During the first 12 months, the small team of workers dealt with about 1,000 inquiries, took on more than 200 cases and achieved some resounding victories.

The Law Centre was established to provide a service for people who cannot afford to pay for legal advice.

Difficulties which often affect people in financial straits — like debt, consumer and welfare benefit problems — are matters that would not qualify for Legal Aid, so private practices will not take them on.

And the centre also represents groups of people, like tenants associations or voluntary aid

## Busy first year chasing justice

organisations, and likes to take on test cases which will set a precedent that may benefit other people in the future.

Among the main successes of the past year are:

- OBTAINING £2,600 war pension for an ex-soldier injured in World War II.
- RECOVERING £5,000 mobility allowance arrears for a claimant.
- PREVENTING the eviction of a sick tenant by last-minute application to the courts and, in the same case, winning back payment of £1,300 housing benefit to clear rent arrears.
- OBTAINING supplementary benefit arrears of up to £2,500 for people in their 50s and 60s.
- GETTING compensation for a street of tenants, because of their landlord's failure to do repairs.

## Appeal for new deal on advice

A NATIONAL network of law centres is the way forward to make legal advice and presentation more accessible, according to Liverpool solicitor.

David Taylor, of the Vauxhall Law Centre, said: "The aim of the centre is to be informal

and approachable — to make people feel they can pop in for advice without it being an ordeal

By Janet Tansley

a raw deal from a legal system which fails to provide justice for all.

The review, which hits out at the legal services "available only for the

# JMF and some further Thematic Initiatives

From time to time JMF has used its knowledge and understanding of the community and voluntary sector organisations to identify an issue which affects or has an important bearing on those involved. The following paragraphs provide examples of such initiatives.

## Sheila Kay Fund

Sheila Kay was a local social worker and anti-poverty campaigner with the then Liverpool Personal Services Society and a member of the JMF Central Advisory Group, who was tragically killed in a hit and run car accident in 1974. JMF was instrumental in helping set up the Sheila Kay Fund in her memory, to help local people active in their community by providing guidance, support, mentoring and funding to help them along their learning journey. JMF did not usually give financial support to enable other charitable trusts to be set up, but these circumstances and the aims of the Fund merited JMF support. In the intervening 40 years, the Sheila Kay Fund has distributed over £1m to give thousands of people the opportunity to create better lives.



## The Stress Conference

In 1999, the JMF instigated some ground-breaking work to explore the problem of stress amongst those involved in community and voluntary sector organisations. A survey report identified excessive workloads, job insecurity and weaknesses in management systems and staff support as key contributory factors. Following a Conference held in October 2000, a Steering Group was set up to take forward further work on the issues raised. JMF provided support and a periodic publication entitled 'Stress Express' was produced and circulated widely throughout the sector. In addition, the JMF decision to establish the post of Community Groups Development Worker arose out of the experience highlighted by the Stress Conference. The post was intended to provide advice and support to organisations on a wide variety of issues and responsibilities which they had to deal with.

Following a further pilot study on the methods available to reduce stress in community and voluntary sector organisations carried out by Health@Work, a proposal to set up a specific service to reduce stress in the non-statutory sector was initially supported by JMF in 2004. This was believed to be the first such service in the UK and represented the culmination of much valuable joint partnership work over a number of years involving a variety of different agencies.

## Community based Action Research

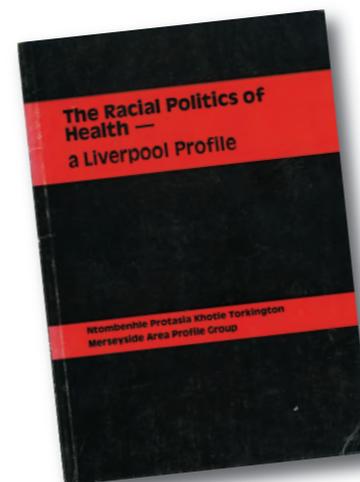
JMF policy has been not to fund academic or medical research. However the contribution made to the Racial Minorities Health Group in the early 1980s enabled some valuable action research work to be undertaken which had positive results in terms of policy and practice in the City. Led by Dr. Protasia Torkington, the work involved researching various aspects of the health needs of racial minorities.

Two particular initiatives were developed as a result of this action research work. Information on the mental health needs of racial minorities provided the basis upon which the Granby Community Mental Health Group was able to establish Mary Seacole House in 1991. The examination of the interpreting needs of those involved with the health service made a timely contribution to the work of the City

Council, which was also concerned about the wider problem of communication with residents and service users etc.

A major step forward was achieved when, in January 1990, the Council set up the Translation and Interpreting Service to provide a properly resourced service initially to offer translators and interpreters in the six main languages which had been identified. Perhaps a sign of

the severity of the situation faced by many for whom English was not their mother tongue was the fact that, within a very short time of operating, the number of languages to which the Service was asked to respond had increased to over 50!



## Liverpool Personal Services Society now PSS



The Liverpool Personal Services Society was established in 1919, an event in which Eleanor Rathbone herself played a significant role. The PSS, as it is now called, has pioneered and

developed a range of care and support services for people in need including, for example, Citizen's Advice Bureau, Age Concern, Adult Placement and Young Carers. It was also at the forefront of the marriage guidance service, now called Relate, and made a major contribution in the setting up of what is now The Riverside Group, one of the country's major Housing Associations.

The PSS has operated a Special Grants Fund which provides small sums of assistance (up to £200) to people in need of essential household items (such as beds, cookers, carpets etc.) and who could not get or afford a Social Fund loan. Applications are made on behalf of the clients by Social Workers, Health Visitors etc.

JMF has supported the PSS Special Grants Programme since 1996 usually along with other contributions from the Amelia Chadwick Charitable Trust and the Liverpool Queen Victoria District Nursing Association. The monitoring reports received by JMF illustrate the depth of need experienced by very many individuals and families across Merseyside and applications for support regularly exceed the funds available. More than 100 families have received assistance each year through this Programme.

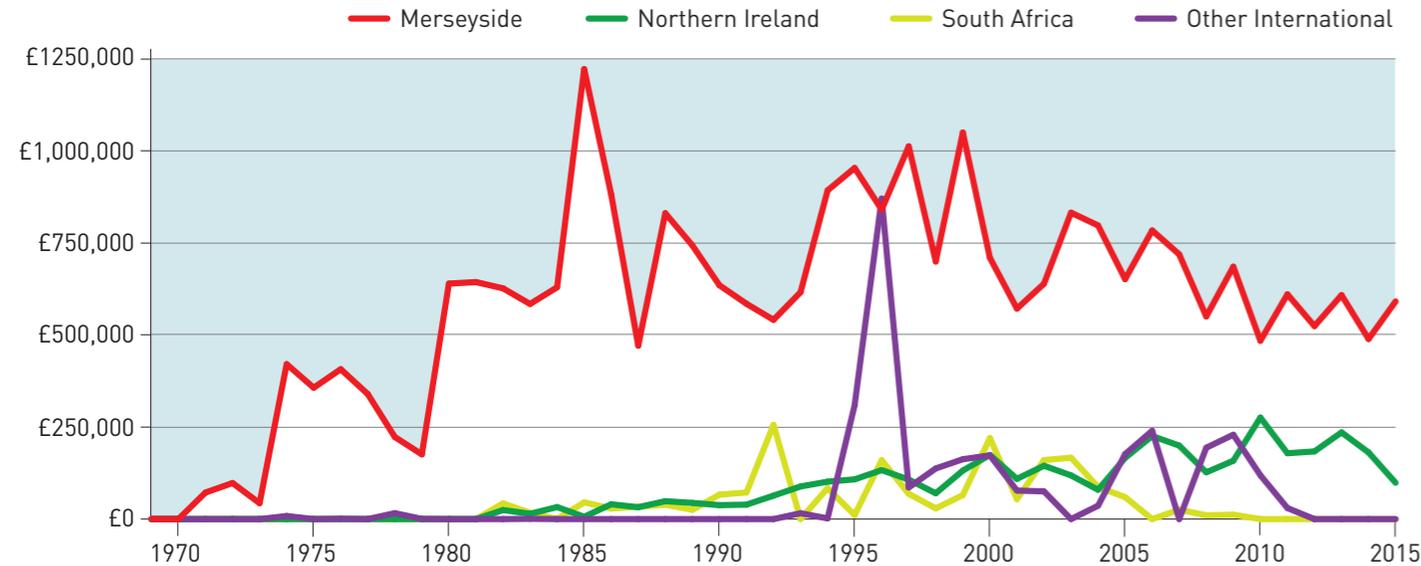
## A word about Money

This retrospective has deliberately avoided specific reference to individual amounts of grant aid received by the many organisations which have been supported by JMF over the years. However information has been assembled on the funds distributed to give an idea of the scale of total amount allocated annually over the five decades. In an attempt to reflect something of the real value of the finance involved the amounts involved have been adjusted for inflation.

The graphic illustration indicates that after a modest start in the first two years: 1968/69 £325 and £124 in 1969/70, the level of grant giving peaked in 1995/96 with a total just

over £2m. The grand total of £36.2m. has predominantly been used to support charitable activities in the Merseyside area £27.5m. with £3.8m. going to support activities in Northern Ireland and £1.8m. to South Africa: the grant making activities for both began in 1981/82. A further significant amount £3m. has also been allocated to support other international causes and appeals mostly during the period from 1994/95 through to 2011/12.

During the more recent period JMF has allocated around £600-£700,000 per annum and now focusses its grant making on Merseyside and Northern Ireland.



## Some reflections...

As with many other Charitable Trusts and Foundations, and indeed other funding agencies generally, the philosophy and approach of JMF tended to grow 'organically' out of activities undertaken and as a consequence of the accumulated wisdom gained. Mistakes were made, but much learning took place along the way. One such lesson was the realisation that JMF had inadvertently created a degree of 'dependency' with some of the early groups who seemed to feel that they could return again and again with applications for further grant aid for similar purposes. After some difficult discussions, Trustees moved towards grants of not more than three consecutive years. In those instances where dependency had become an issue, a tapering off process was sometimes required.

Those who are familiar with the local political scene in Liverpool which pertained for significant periods of the five decades in which JMF has been in existence will appreciate that the Foundation was reluctant to become too entangled with Local Authority funding. Reviews of City Council grant aid often seemed less than objective or impartial assessments of voluntary sector activity, the introduction of a policy of Municipalisation of non- statutory sector projects, the withdrawal of Urban Programme funding, not to mention the 1986 financial crisis which nearly brought the whole of the Authority to a halt with the issue of wholesale Redundancy Notices, all gave ample cause for JMF to be wary of becoming too involved with the Authority.

JMF generally prioritised support for 'hard to reach' groups and those working with marginalised groups or causes.

Preference was always given to applications from the small community group trying valiantly to provide useful activities for people in its area or the voluntary organisation working hard to support older people or those with particular needs, over the well written application, full of statistics from a City Centre- based professional outfit. A welfare benefits take up campaign was preferred to a training course for fund raisers.

An extension of this same philosophy was the fact that JMF targeted organisations where even a small grant would have a significant impact.

As the years progressed and the number of grant aided organisations grew with increasing speed, the Trustees appointed a full time Trust Officer to handle the workload. Linda Lazenby was the first appointment who took up the position in 1980.

Some years later, in 1995, JMF created the post of Monitoring and Evaluation Worker whose role included visiting projects and the preparation of reports to accompany those produced by the organisation itself.

The scale of the applications being received and the need to maintain a record of decisions made led to the introduction of a simple form to be completed by all applicant groups. The improvements in record keeping also had benefit in the reporting to Trustees since much better and more useful information could be provided on the outcome of previous grant applications, extracts of Monitoring reports etc.

In 2000, the Foundation appointed a Community Groups Development Worker to provide advice and support to groups in recognition that managing grant aid places a responsibility on those involved in such organisations which they sometimes find difficult to meet (e.g. keeping abreast of legislative changes, financial management, managing and supervising staff). The Foundation realised through their substantial experience of working with a wide variety of groups across the community and voluntary sectors that sometimes the help that is needed is not monetary but advice and appropriate information to help deal with a particular problem or task that needs to be handled properly.

As well as giving advice to groups on how to deal with tricky situations, the Development Worker helped with the preparation of Business Plans, Staff recruitment processes and offered advice on potential sources of funding that might not have been known to the group concerned. Rather than suggest any sign of duplication, the product of the Community Groups Development Worker has been mutually very beneficial to both the groups concerned and to JMF.

Although not strictly arranged under the auspices of the JMF, John also convened some "Community Meetings" to which he invited, on a personal basis, a wide range of individuals from across community/voluntary sector in Liverpool and the wider area of Merseyside to create the opportunity for closer contact and hopefully provide the basis for greater partnership working. The meetings were held in the Executive Suite on the top floor of the JM Centre in Old Hall Street and lunch was provided. Sometimes a speaker would talk about a topical issue, or several people would mention things they were involved with or perhaps could do with help or advice about. They acted as good opportunities to network across the sector and continued for some years in the 1990s.

In the invitation letter John occasionally and quite characteristically made clear that he regarded one of the purposes of the meetings to enable him to "keep in better touch with what's going on in the local community". This undoubtedly had its benefits for JMF and its grant making responsibilities.

A yet further essential observation must recognise the huge personal contribution (extending way beyond the purely financial) that both John and Jane Moores have made to JMF over the years. Few Charitable Trusts and Foundations can be so well known throughout their area of benefit and no benefactors so readily recognised and well respected. Many of those involved in community and voluntary sector activity in Liverpool and the wider area of Merseyside over the past decades have their own fond memories of direct personal contact with John and Jane.

The early days of JMF were not encumbered by application forms, monitoring reports and output measures, there was plenty of time for them later on.

But however you seek to assess or measure the outcomes of 50 years of grant making in some of the most disadvantaged areas of the UK, Northern Ireland and South Africa, the impact of the JMF support is immeasurable:

- **enabling informal adult education unleashes people's wasted talents,**
- **supporting community activity creates power beyond individual achievement,**
- **enabling care for those in desperate need can be life-saving.**

This retrospective of JMF has only scratched the surface. We all experience and share the benefits without realising it!

## The 50th Anniversary Conference

On November 26th 2014 JMF held a free Conference at the Merseyside Maritime Museum to celebrate their 50 years of grant making in Merseyside and Northern Ireland. The event included Workshops, Discussions, Food, Music and Poetry with a key note address by Ken Livingstone, former Mayor of London. There was also an opportunity for those attending the event to contribute to a review of JMF's grant-making policy which was being undertaken at that time. The event was booked to capacity and some applications for places had to be turned down.

The aim of the Conference emphasised the support given by JMF to grass roots community participation since 1964 and encouraged those attending to recognise that "power is participation and participation is power". The workshops provided an opportunity to explore and debate a wide range of issues emanating from or underpinning this theme.

It is therefore appropriate to end this Retrospective with the address with which Barney Moores, present Chair of JMF, opened this Anniversary Conference, since he reflected on the contribution his father John had made to JMF and properly credited his mother Jane for her crucial but discrete role throughout.



# Barney Moores



## Good Morning, and a warm welcome to you all.

This Conference, as many of you will know, marks almost exactly the 50th Anniversary, of the founding of John Moores Foundation.

The Foundation was named after my father who, sadly, did not quite live long enough to commemorate this milestone with us, but is here in spirit.

I'd like to pay tribute to the staff, trustees and advisors of John Moores Foundation, both past and present, (especially those with us here today), without whom none of us would be here.

The Foundation could, or should, perhaps have been known more accurately, though less succinctly, as the John and Jane Moores Foundation. However, as you know... Behind every successful man is a woman who doesn't get the credit. So, 50 years down the line, it is time to give the credit where it's due.

My mother Jane is with us here today.

From quite small roots, the Foundation has come to play a significant role in various, social and community initiatives and has helped to establish, and support, a huge number of groups. And over the years it has grown into a well-respected organisation, an achievement of which John was particularly proud.

The themes of this Conference, build upon the long history of the Foundation's work, both in Merseyside and in Northern Ireland, where it has always placed great emphasis on work with grassroots community groups, and has encouraged cross-community co-operation, and the breaking down of barriers.

Throughout its life, the Foundation has continued to be quite innovative, and has paved the way in some significant areas.

In the early days, John and Jane focused almost exclusively on Youth, as they sought to move away from, the more usual, Boys Clubs, of the time, so as to include also Girls - quite a radical step in those days. This early work was primarily at the Bronte, where they later also initiated the expansion of the youth club into a community centre. The connection with the Bronte led to a summer camp at John and Jane's farm in Formby, and to a more permanent residential holiday centre at Formby Hall. Another quite innovative development.

The Foundation initially operated in a very ad hoc fashion, and in fact we did not have a paid official for the first sixteen years.

We have always prided ourselves on our ability to listen, and to take on board advice, and even criticism, recognising where we made mistakes, and learning from those, who are actually doing the work.

The Foundation's history, and its operating policy, can be seen as an ongoing series of tweaks and innovations in response to what we see and hear.

By way of example, after the riots in the city in the early 1980s, John had many meetings in the area, where he listened more than he spoke, and felt that he learnt a huge amount, some of which he incorporated, both into the operations of the Foundation, and also into Littlewoods, of which he was a director, where he pushed for the establishment of an Equal Opportunities Programme, which was considered quite a radical step.

The Foundation's continuing interaction with the community, led to a realisation of the need for monitoring, and so we introduced the post of Monitor in 1997. This is now such a normal part of grant-making that it's odd to think that it was then quite a novel idea.

Clearly, there is something of a checking element to monitoring - i.e. making sure that the grant was used correctly - but the idea originated in our needing to be sure that the grant had in fact achieved what the group intended, and in our wanting to know if there were other ways in which we could assist groups.

This then led us to recognise that groups can require more than a grant, or maybe, something other than a grant - perhaps help with capacity building, or in their organisation.

We therefore initiated the role of our Community Groups Development Worker in 2000 - Again this was something of an innovation, one which few other grant makers have yet also introduced.

This Conference, as I mentioned earlier, builds on this history of innovation, and on our record of listening to what groups tell us about what they need, and consequently about what we need to do.



The three main aims of today are:

- **to explore new ways that groups can work more effectively;**
- **to help us review our policy and practice;**
- **and to celebrate 50 years of the Foundation, whilst meeting with friends old and new.**

With regard to the first of these aims, we have arranged the conference workshops in two parts: This morning we will look at “Overcoming barriers, to organisations working together, more effectively, for the benefit of their communities.” Then this afternoon we will discuss “Strategies, for increasing the participation, and representation, of members of our communities”.

Personally, I would not like this latter part, to be confused with the Government’s ‘Big Society’. On the face of it, the Big Society is a plausible suggestion though it is something, which, to a large extent, is already happening, and also it seems, (not to put too fine a point on it) something of a fraud, since it amounts to Grant-makers and Community groups, being asked to take up the slack, caused by the removal of Government funding, in these increasingly austere times.

It is not our place to be overtly political, however, these are indeed austere times, with more austerity on the horizon, and we believe that most groups are finding it increasingly difficult to raise funds, and quite a number of groups that we have funded in the past are, sadly, no longer with us.

So, we hope to help and encourage groups, to work together more closely, to share resources and experiences, and also, to encourage those within the community, to become more involved, in working with and for, their communities, and to recognise that their community, shares many problems, and also solutions, with other communities.

In this spirit, I would like, again, to welcome you all here today, and hope that we can have a truly productive day, that will benefit us all. We would like to encourage as many of you as possible to share your own experiences, and comments, whether in the presentations, the workshops, or in the various breaks.

We hope to take what we learn here, as a Funder, and to feed this into our forthcoming Policy Review, and on that basis we hope to encourage suggestions about what we might do differently, and indeed what we do well.

We will of course later be joined by Ken Livingstone, whom some of you may have heard of, and he will share his experiences with us, and answer your questions. I must say that my dad would really have looked forward to this segment.



The third aim of the day is, of course, to celebrate our 50th anniversary, and we hope that as many of you as possible will be able to stay on after the conference, and enjoy the occasion, with us.

I would like to take this opportunity to mention that, during this Anniversary year, we will be publishing a retrospective of John Moores Foundation, which is very kindly being worked on by Nigel Mellor, who will say a few words about this later in the day, Nigel is also here at the conference with us, I’m sure he would be happy to speak to any of you, who would like to do so, about your experiences of working with the Foundation.

Finally I would like to thank all those who have made this day possible, from the hard-working staff of John Moores Foundation, and the Maritime Museum, Ken Livingstone, and the Lord Mayor, our Chairperson for the day, the various Workshop takers, the caterers, the musicians, singers and poets, and of course you, the delegates, for joining us.

I’d also like to thank all those who have sent in comments, memories, and messages of support, which have been lovely to read

We clearly hope that there will be no need for Foundations such as ours in fifty years’ time, but if we are still around then I would hope to see you all at our Centenary party.

Thank you all very much.

Enjoy the day!

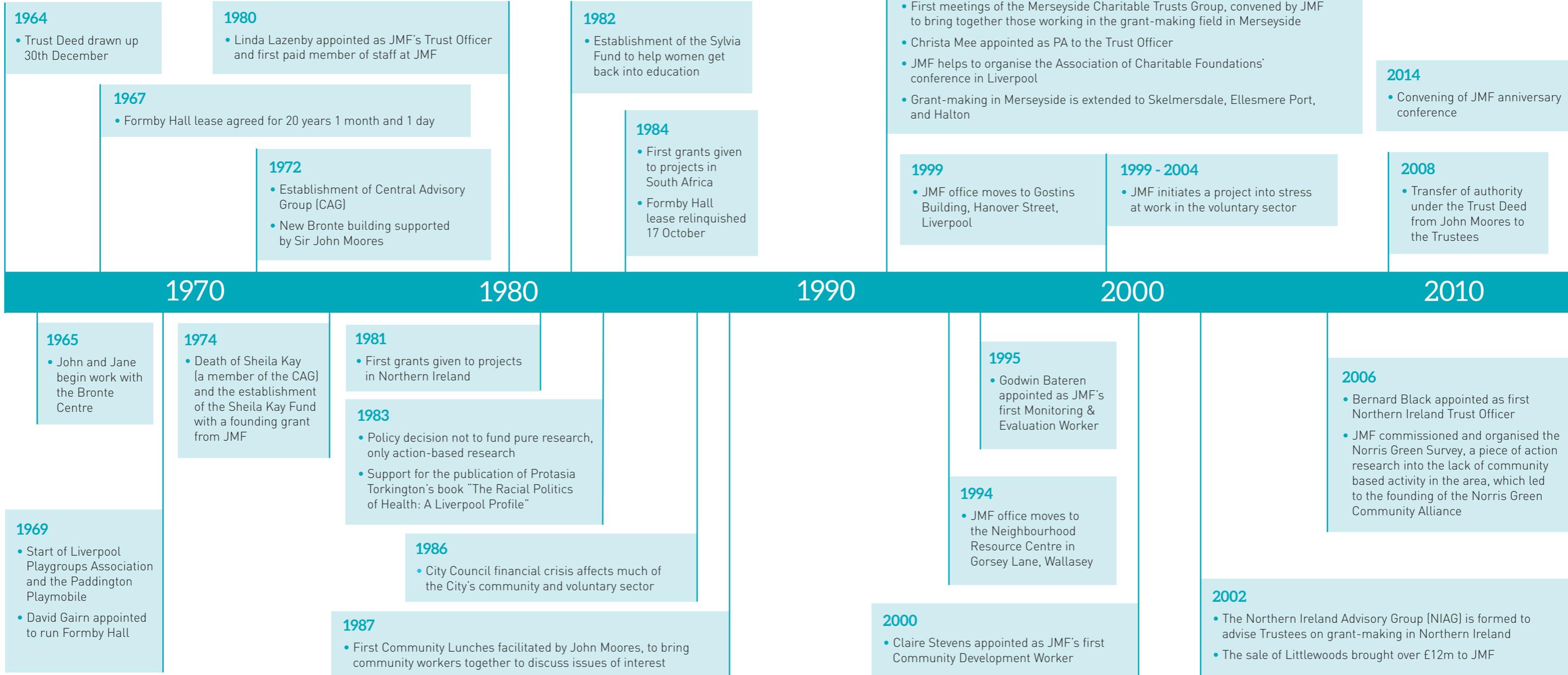


### *A view from the staff...*

*Being a local funder is a huge advantage in terms of the additional support we can give to groups as we know what is going on in our area and who is doing what. We still follow the ethos of John Moores when he set up the Foundation 50 years ago – and there are a lot of ways to do that on top of giving grants.*

*It was a privilege to work for a settlor and trustees who put into practice their belief that the Foundation’s income could and should enable local people to change their lives, and those of their fellow citizens, for the better.*

# John Moores Foundation : Timeline



## Some personal reflections

**This section contains a range of thoughts, experiences and reflections from members of community and voluntary sector organisations and others who have had contact with JMF over the years. They are not based on any scientific selection nor are they attributed to the individuals concerned.**

Nevertheless, it is hoped that they convey something of the wealth and variety of the impact which JMF has had in so many different ways and to so many different people across Merseyside, in Northern Ireland and South Africa.

This is only the tip of the iceberg!

### Individual's views and experience...

*"I think JMF has a simple clear process (much better than other funders we apply to). As a medium sized organisation we would love to be able to apply for grants larger than £10k but acknowledge the impact JMF can have by giving more grants at this level than fewer larger ones. Thanks and well done!"*

*"The social sector needs more support for infrastructure organisations to help address a lot of issues raised and especially provide options for smaller organisations to access advice and support"*

*"I think that JMF do a great job and have a very open mind to grant making and are very supportive throughout the term of the grant"*

*"JMF could find ways of supporting asylum seeker communities who are destitute and have no recourse to public funds. Many are homeless and have no means of support, but cannot safely return home, yet they are not permitted to access public services and use homeless shelters. This leaves refugee support organisations and faith groups carrying the burden but because they are so focussed on fire-fighting they struggle to secure long term funding."*

*"We have been extremely grateful for their generous contributions to support our service users who are adults experiencing mental health problems from primarily BME communities.*

*We have been granted financial assistance that has allowed us to deliver confidence building and health & wellbeing training courses for our service users.*

*Through their generosity over the last 4 years over 70 service users have completed the training courses and moved onto further education, volunteering roles, or employment."*

### A view from the City Council...

*Philanthropy is an important component of the mix of funding to support the third sector in the delivery of its work. It enables organisations to reach some of the most deprived communities to deliver services which keep people safe, support community cohesion and reduce the dependence on other mainstream services.*

*It is true to say that without philanthropists, the costs to the public sector of supporting our communities would be far greater than just a monetary value alone. It would be unsustainable, fragmented and not reach those most in need in the same way that community organisations can and do. Never has the importance of philanthropic funds been so essential to our communities, in the context of austerity, the loss of non- mandatory services which communities depend on and the fragmentation of public sector.*

*As we celebrate the 50th anniversary of one of the regions home grown philanthropists we should reflect on the impact on local communities the John Moores Foundation has had. People whose life chances have improved, those who were excluded who now connect with their communities, or those who are back in work and economically active may never fully appreciate how the projects and services they accessed were funded. The contribution the Foundation has made to local communities is without doubt true 'social value in action' supporting the notion that social value is nothing new and existed long before the much heralded appearance of the Public Services (Social Value) Act 2012.*

*Clearly demonstrating that greater social value can be derived when corporate social responsibility is managed strategically and targeted to where it is needed the most, philanthropy can deliver significant economic benefit.*

*The John Moores Foundation adds value to the range of financial tools available to the third sector and equally important compliments the resources of the public sector targeted at communities. Without it the demand on the public purse to deliver more to bridge the gap would be untenable. Without it communities would be far poorer, less resilient.*

 **The role of philanthropy in our society should be recognised and celebrated and the contribution of the John Moores Foundation held as an example of how private money can underpin the local economy and change the life chances of generations of vulnerable individuals and groups.** 

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### *A view from the further education sector...*

*I first met John in the late 1970s early 80s.*

*Our youth club was seeking funding for a girls worker. I was to meet John at the centre to discuss the post. I had never met a millionaire before and I was very nervous.*

*However the modest unassuming man in a small basic car, wearing a check sports coat turned up. This must have been before the Foundation employed someone to assess projects seeking funding.*

*John soon put me at ease, he was genuinely interested in our work, and the Foundation funded the post for three years.*

*Over the next thirty years, I would develop a good professional relationship with John and the Foundation.*

*For me the most unique aspect of JMF was the quiet way it went about its business. It funded projects but sought no publicity. Almost every voluntary organisation in Merseyside seems to have been funded by the Foundation, but no one knew who else was being funded.*

*I recall the Community College being involved with the Foundation in a project in Soweto, South Africa. JMF funded two lecturers to go to Soweto to train women in the township so they could then teach other women. It was a "training the trainers" project. These were the days when Nelson Mandela was still in prison, and only the truly dedicated were offering support in South Africa.*

*The Foundation invested significant funds into the project, not only funding staff to go to South Africa, but also funding a group of women to come to Liverpool for further training. Again this ground breaking initiative was delivered without any publicity, nor any desire for plaudits.*

*I cannot imagine the state the voluntary sector in Merseyside would be in without the funding the John Moores Foundation has injected.*

*I cannot speak highly enough about the amazing partnership of John and Jane Moores. It has been a privilege to have known and worked with them.*

*May the work of the foundation continue for many, many years to come.*

### *A local activist's view...*

*In the mid to late 1980's Kirkby Unemployed Centre was just getting off the ground, mainly with support from Merseyside County Council when it was abolished! Unbelievably at that time assisting the unemployed was not regarded as being a charitable purpose so KUC was not a charity.*

*JMF provided funding to enable the Centre to continue but provided it via other organisations such as the Merseyside Information and Advice Project who were based in Everton Library and were a charity. John Moores took an interest in the KUC and was impressed with the Kirkby Response Theatre who were in full flow in the '80s and '90s.*

*Over the course of a couple of years Kirkby Unemployed Centre found its feet again and went on for many, many years when it might not have made it without the valuable support given by JMF.*

*The times really were grim in Kirkby around that time the Bird's Eye closed putting over 1000 people out of work, the announcement being made on the day of one of Margaret Thatcher's very rare visits to Liverpool. She cynically blamed the workers, despite the facts illustrating it was a profitable factory.*