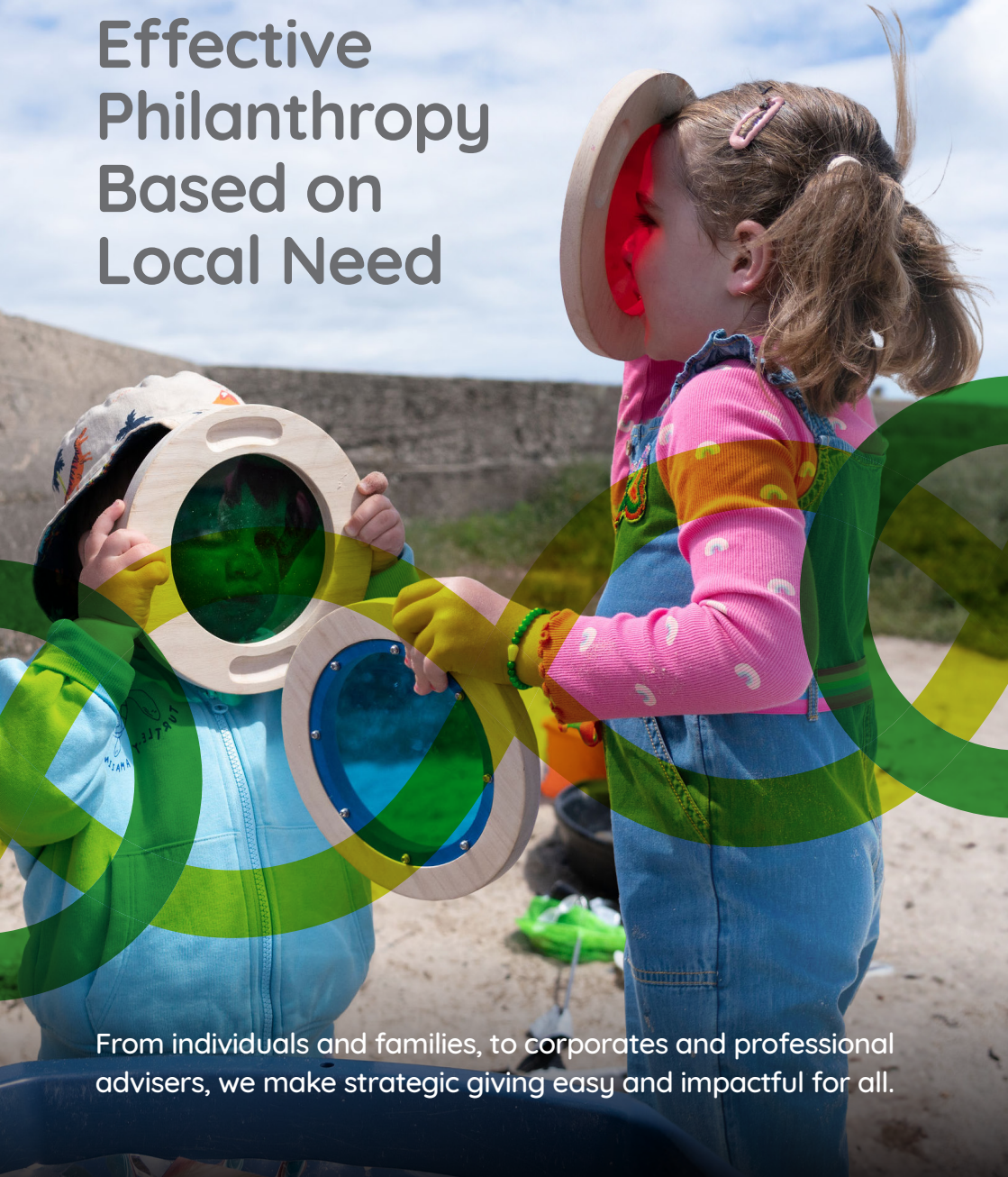




Strategic Giving

Effective Philanthropy Based on Local Need



From individuals and families, to corporates and professional advisers, we make strategic giving easy and impactful for all.

Supporting you on your philanthropic journey

When it comes to philanthropy, it can be challenging to know where to begin. In a crowded landscape where charitable organisations and causes are competing for donations, it can become overwhelming and difficult to navigate what should be a rewarding and joyful experience.

At Jersey Community Foundation (JCF) we provide strategic guidance and support. We are your trusted philanthropic partner ensuring that the funds that you donate are properly used, secure and strategically invested in line with your wishes.

This guide sets out how we can assist you on your philanthropic journey, no matter what stage you are at.



"When donating, it's important not to view it as giving your money away, but as giving back. This way of thinking makes it easier to let others join in so that they can contribute their time, skills and expertise in a way that maximises the effectiveness of your giving. Community Foundations are a perfect example of this because it's like collaborating with a wealth manager - they know how to maximise the impact of your contributions."

Ross Badger, Trustee, Sedel-Collings Foundation.



How we work with Individuals & Families

Setting up a fund through JCF is similar to having your own charitable trust but without the hassle of administration or worrying about governance, recruiting trustees, producing audited accounts and reporting to regulators.

We take care of that.

It's quick and easy to start and whatever your reasons or motivations for giving, we'll ensure your fund is future proof and suits your wishes and your circumstances.

With access to our expert team, extensive community knowledge, research and advice on giving we'll guide you through options and deliver regular feedback and reports on how you're changing lives and making a difference.

As a philanthropic hub we offer the services you need when you need them.

"Whatever your circumstances, personal experiences, or passions, we're here to help you to give effectively and with impact."



Stages of Giving

No individual or family are the same and each has their own philanthropic path. You or your family may:

- Find your philanthropic feet and pursue your passions by setting up your own Donor Advised Fund
- Support vetted, ready-to-go projects or take a collaborative approach investing in an existing Fund at JCF
- Have a lump sum to donate from an IPO, a sale, or an inheritance
- Wish to engage the next generation in giving and establish a family wide approach to philanthropy
- Have your own Foundation and simply need guidance on supporting particular charitable organisations
- Wish to give back in the place where you are from or now live
- Wish to leave a lasting legacy

Four ways of Giving with JCF



Set up a Donor Advised Fund (DAF)



Donate to an existing Themed Fund



Donate to JCF to help us fulfil our community driven vision



Leave a Lasting Legacy

Set up a Donor Advised Fund (DAF)

This tailored, private giving vehicle is ideal for those who wish to pursue personal charitable interests, as well as those wishing to avoid the administrative burden and costs associated with starting their own Foundation.

Flexibility is key to this offering, including the duration of investment and engagement, sharing of decision making with family, as well as choices in relation to privacy.

We can either set up a Flow Through Fund, meaning we can distribute donations to the fund as grants straight away for immediate impact, or set up an Endowment with the resulting investment returns being made available for grant-giving in perpetuity – or a hybrid of the two.

Key Fund benefits:

- Fully tailored to your own personal charitable interests
- Reduced administrative and cost burden vs starting your own Foundation
- Family decision making and privacy options
- Full flexibility in fund type, duration and engagement

Donate to a Themed Fund

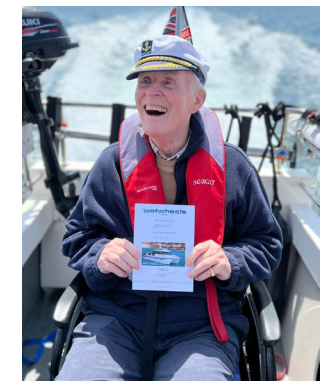
One of the most rewarding ways to give can be to give collectively. Supporting an existing fund is highly strategic and facilitates a collaborative and effective way to give.

For clients who are not yet ready to commit to a Donor Advised Fund but who still wish to support a range of voluntary organisations across the Island, making a regular or one-off donation of any size to one of our Themed Funds may be a solution.

Donations can be combined for maximum impact. This offers an opportunity to collaborate and pool funds with other donors who all share a passion for a particular cause.

Key Fund benefits:

- Effective charitable giving via an existing fund
- Collaborative approach
- Regular and one-off donation options



Jersey Community Fund

Leave a Lasting Legacy

Our main Themed Fund, the Jersey Community Fund, supports current and emerging needs in our communities. Using data and evidence from our Local Needs Assessment Research, and our local knowledge and expertise, it enables us to be pro-active and responsive in addressing the current needs of the Island.

Donors to this fund can be assured that their gift will be used to support a vital local project which is in need of support.

Donations of any size can be made to the Jersey Community Fund at any time and allows us, using our local knowledge and expertise, to get the funds to where the need is greatest quickly and efficiently.

Key Fund benefits:

- JCF's main themed fund
- Pro-active fund that addresses current needs of the Island
- Local expertise and data driven which can maximise the impact of your contributions
- Quick and efficient fund distribution
- Regular and one-off donation options

While some people will have a clear idea which charities they wish to support through leaving a gift in their Will, others may want to give back to their local community but are unsure exactly which charities to support.

A long-term option is to name Jersey Community Foundation in your Will, with the instruction to use the legacy to support a particular cause or for it to be unrestricted.

That way, even if a specific charity or cause is no longer in existence when the legacy is realised, we can ensure that your original intentions are carried out.

Key Legacy benefits:

- Long term focus
- Tailored to your own personal charitable interests and wishes



Growing the culture of philanthropy in Jersey

Donors setting up a fund with Jersey Community Foundation are asked for a contribution towards our general charitable purposes. Your contribution helps us grow philanthropy and awareness of local need in the Island and support more great causes.

These donations enable us to deliver additional benefit for Jersey and the local groups we support, including:



Giving expert advice and support to local community groups to improve their work



Fostering collaboration between local groups and organisations tackling similar issues



Opportunities to join up with other fundholders to support an issue, such as mental health, supporting the elderly or encouraging access to the arts, making donations go further



Publishing reports that highlight key issues facing Jersey, raising awareness and building profile for local charitable organisations



Streamlining the process for charitable organisations applying for funding by allowing them to apply to multiple sources of funding at the same time



About Jersey Community Foundation

Jersey Community Foundation (JCF) is an independent charity that delivers effective philanthropy based on local need. Between October 2020 and August 2024, we distributed close to £8m in grants across 350 organisations and individuals in Jersey.

Quality Accreditation and Governance

JCF is part of a UK wide accredited network of 48 Community Foundations, who are committed to improving the lives of local people and communities focused on supporting the areas of greatest needs.

Quality accreditation is a programme which endorses and encourages best practice by Community Foundations. Achieving quality accreditation demonstrates that a Community Foundation delivers to a standard and is serious about quality and accountability.

We view corporate governance as one of our most important responsibilities. Public confidence in the transparency and accountability of the work of charities has never been more important. Our promise to our fundholders is that, whatever the size and nature of their contribution, they can be sure it is going straight to where it is needed and will do the most good.

The UK Community Foundation Quality Accreditation programme runs every four years, and JCF will be assessed in October 2024.



Typically for flow-through funds, we ask for a contribution of between 6-10% of the annual donation depending on the scale and complexity of the fund. For endowment funds, we ask for a contribution of 3-5% of the initial donation to set up the fund, and 1-1.5% of the endowment capital annually.

"We can advise you on the causes and charities to support, in the best way with the right amount and at the right time."



Need in Jersey

It doesn't make easy reading, but it is important to highlight the extent of deprivation which exists in Jersey. Our beautiful and much visited Island which has so much to offer, faces many challenges of disadvantage and social need – and much of it is hidden.

In 2022, the Foundation compiled research to demonstrate the extent of community needs and social deprivation across Jersey. The published findings feature in JCF's Local Needs Assessment Report available on our website, and provide tangible, relevant and recent data that form the basis of a strong, evidence-based approach for our grant giving activity.

In particular, mental health, the ageing population, loneliness, health issues, child poverty, housing and wealth differences were all factors creating real challenge for people in Jersey.

Through our research and understanding of local issues, our purpose is to enable fundholders to undertake informed and targeted grant-making to the causes they care about.

Our vision is to ensure islanders are healthy, included and engaged, supported by a strong, efficient, impactful and thriving social community infrastructure.

Inspiring people to entrust their funds to JCF to finance impactful and potentially life-changing projects and respond to emerging need will help us achieve this vision.

Through our research and understanding of local issues, our purpose is to enable fundholders to undertake informed and targeted grant-making to the causes they care about. We focus our community grant making priorities in response to the needs identified, which are:

1. **Community inclusion and tackling inequality**
2. **Caring for an ageing population**
3. **Addressing the impact of the cost-of-living crisis and poverty**
4. **Promoting mental health and wellbeing**
5. **Encouraging healthy living, including combating obesity**

Charitable organisations play a pivotal role in addressing these priority areas – as well as many other important areas – offering invaluable support, services and resources to those in need.

Alternative Routes to Impactful Funding via JCF

Corporate Fundholders

We offer similar support to corporate fundholders (who can be businesses of all sizes, solicitors, accountants and land agents etc) who have an interest in the local community and wish to put their corporate social responsibility into practice.

Charitable Trusts

We can also take on existing charitable trusts, using our knowledge and infrastructure to reduce administrative costs and make grant making more informed, efficient and impactful. We provide a range of options from assisting with grant-making to taking over legal responsibilities for the trust completely, yet with clients retaining an interest if they wish.

In Memory and Tribute Funds

There are instances where family and friends of people who have died wish to set up a fund in their memory. The Jersey Community Foundation can help establish an In Memory or Tribute Fund, creating a lasting legacy for a loved one.

We can tailor the fund themes and criteria to ensure the funds are spent in a way that best represents the chosen causes. This is a low-cost solution for families and can be set up immediately. It is also tax efficient as Jersey Gift Support can be claimed on funds raised as appropriate.

Jersey Community Foundation is an ideal vehicle for philanthropists wishing to structure their giving to local charitable organisations in an efficient way. We make charitable giving to local cause stress-free, easy and enjoyable.



By working with us, you can benefit in a number of ways:

We are local

Your funds will be used to support the local community in which you live and work. You can visit projects and see for yourselves the positive impact that your charitable giving achieves.

We are impartial

We do not favour any one particular cause or theme.

We are flexible

With a Donor Advised Fund, you can choose the causes you wish to support. Grants can be made to charitable causes and not just registered charities. You can change your focus at any time which enables you to respond quickly to emerging social need. You can be involved as little or as much as you like in the grant-making process. Anonymity can be maintained if desired or publicity achieved, dependent of preference.

We are quick and efficient

We can set up a personalised fund as soon as you are ready rather than waiting several months to register as a charitable trust.

We make giving easy

We promote the fund and invite applications from community groups and review them, carrying out the due diligence to check validity and synergy with your wishes. We arrange for grants to be made from the fund and undertake end of grant monitoring to ensure the money has been spent on the project and to measure the impact it has made.

We are connected

Our deep connections to community and voluntary groups that make a difference to local communities, enable us match your interests to effective projects, causes and initiatives.

We are data-driven

We are committed to building a solid framework for our Island's philanthropy, one that can be relied on to be effectively and independently run. Our Local Needs Assessment research, conducted by PwC provides the basis for a strong, evidence-based approach for our grant-giving activity.

We are here to stay

If you leave a legacy in a will today, it is possible that the charity you want to fund is either no longer in existence or no longer doing the same things by the time the Will comes into effect. We can ensure your original intentions are carried out without having to seek a variance of the original deeds of a trust or intentions in a will.

We are transparent

We ask for a contribution towards our operational costs for managing a fund which varies depending on the size and type of fund and we agree this, up front, with fundholders. We operate with a low overall administrative overhead, which means that more money can go out in grants to the community.

We carry the financial and legal responsibility

A personal charitable trust can be time-consuming and costly to establish and administer. The onus on trustees is increasing – to invest and monitor the investment of funds, to ensure regulations are followed in grant-making, to meet the stringent needs of accounting requirements. With a Donor Advised Fund, all these responsibilities lie with us.

Above all, because our service is personalised and very flexible, it is very likely that we will be able to find a solution that meets, and maybe even exceeds, your needs and expectations.

Jersey Gift Support

Jersey Gift Support enables charities you support to get extra money on your donation without it costing you a penny more. To claim Jersey Gift Support, you must be a Jersey taxpayer. The Foundation can claim an additional 25p for every £1 you donate.

For example, on your donation of £10,000, we can claim £2,500 in Jersey Gift Support, meaning your total gift will be £12,500.



For further information, please contact JCF's CEO at
anna@jerseycommunityfoundation.org

jerseycommunityfoundation.org