

A Guide to Giving in Your Local Community



Creating strong local communities by connecting those who want to help with those seeking help.



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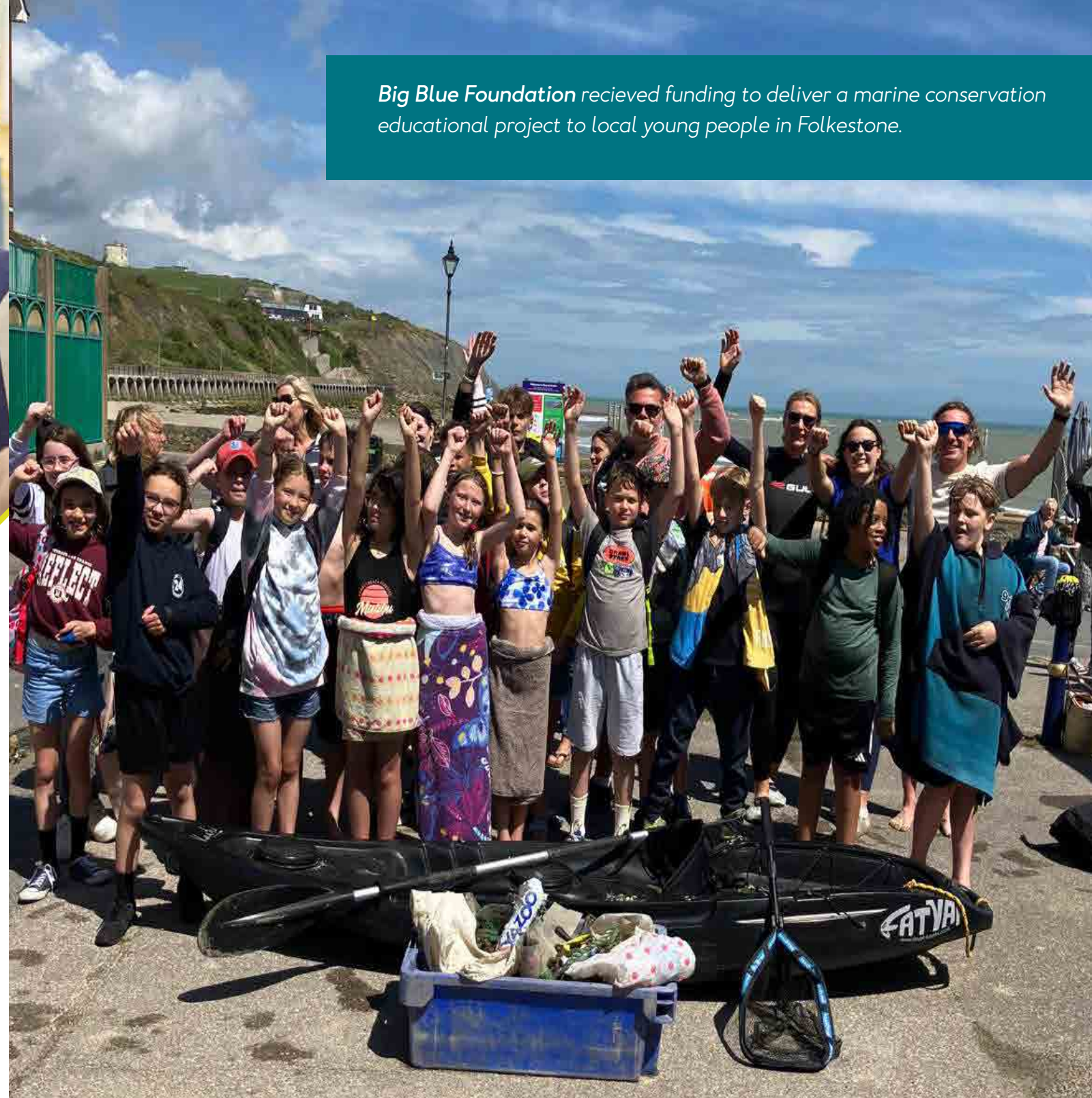
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Welcome

If you have been given this brochure by your professional adviser, a friend, or you have requested information from Kent Community Foundation directly, then it's likely that you will already be thinking about charitable giving in Kent and Medway. You have probably been thinking for a while about how you can make a positive difference to local people's lives who are less fortunate in the county but you're not sure where to start. At Kent Community Foundation, our job is to make charitable giving should be a fulfilling and uplifting experience. Since 2001 we have been advising private families in the county and we are sure we can help you achieve your charitable aims. Read on to find out more about becoming a fund-holder with us.

Robert Sackville-West DL, Chair of Trustees





Big Blue Foundation recieved funding to deliver a marine conservation educational project to local young people in Folkestone.

Giving should be rewarding

Making a difference to your local community through charitable giving should be an enjoyable and rewarding experience for everyone involved.

But setting up and managing your own private family trust can take a lot of time and require specialist expertise. There is much to consider to ensure your money will be used effectively, with credible organisations within your community.

If you are thinking about charitable giving, it is likely you have already asked yourself at least one of the following questions:

- Should I set up a private trust or are there other alternatives?
- Is there an easier way to achieve my charitable aims?

- Where do I go to get the right advice?
- If I set up my own private trust how will I manage the giving process to local charities?
- How can I be sure the applicants are who they say they are?
- How will I be sure they'll spend my donation responsibly?

These are common questions people ask themselves when they're thinking about formalising their local charitable giving. But when the onus is on you to ensure your money reaches the right causes it can sometimes start to feel like a burden, rather than the fulfilling experience it deserves to be. Kent Community Foundation can take that burden away from you.

Kent Community Foundation can take care of everything to make sure charitable giving is always fulfilling without administrative burdens.

‘We did not have the time or knowledge to research individual charities, but knew with Kent Community Foundation our money would be well spent.’



Feel confident that you will make a difference

A study* into the barriers to charitable giving found a lack of faith in charities and a lack of control over how donations are used were two of the biggest reasons holding people back from giving more to their community.

It's understandable. It's only natural when you make a donation, especially a significant one, that you want to know it has been spent wisely.

But when this is not your area of expertise it can be difficult to know what to look out for, how to ask the right questions and how to get the peace of mind you need to feel confident that your gift will make a real difference.

You need expert insight into the most deserving causes that meet your community's greatest and most urgent needs. We can share this with you.

The study found 42% of high net worth individuals believed their donations would not be large enough to have a significant impact. At Kent Community Foundation we make sure every penny you donate counts.

23% of high net worth individuals cite a lack of knowledge, experience and contact with the charity sector as a barrier when considering large donations.

*Source: Savanta Study, 2020 (www.savanta.com/view/barriers-to-giving)



Reach grassroots organisations you never even knew existed

Responsible for more than 100 philanthropic funds, Kent Community Foundation is unrivalled in its knowledge of local causes across the county.

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We can reach the grassroots organisations you never even knew existed – you can build credible and rewarding relationships with those closest to your heart.

We find and vet organisations that matter to our fund-holders. Giving them confidence that their donations are meaningful and will make a

difference to the causes most important to them.

We are fully embedded within the Kent and Medway charitable sector and work closely with charities to ensure they receive the support they really need. We receive more than 1,000 applications from local causes each year and have distributed more than £60m in grants since 2001.

An accredited grant-maker, we’re part of a UK network of 46 community foundations, and a key distributor of local and national government money to the voluntary sector in Kent and Medway.

You can rest assured any donation you make will be handled by experts who have their finger on the pulse when it comes to understanding the needs of our community.

Why fund-holders choose Kent Community Foundation

Setting up your own fund can quickly become complicated and donors often look for expert advice to guide them on the best way to proceed. Below are the four key reasons fund-holders choose Kent Community Foundation to manage their funds:



1 You receive expert support from community fund management specialists



2 We help you establish meaningful relationships with the causes that matter most to you



3 Our comprehensive reporting ensures you know where your money has been spent and how it has made a difference



4 Our meticulous due diligence means you can rest assured your donations are going to credible, fully vetted charitable organisations

Kent Community Foundation is a key distributor of local and national government money to the voluntary sector in Kent and Medway.



Peter Hardy DL

The Ivy & Jane Charitable Trust Fund

THE IVY & JANE
CHARITABLE
TRUST FUND

Peter, pictured left, held the role of Chairman of Trustees at Kent Community Foundation in its early years, as well as founding The Ivy & Jane Charitable Trust Fund. Peter shares his path to becoming a fund-holder here.

‘Inspired by Kent Community Foundation’s aim to “improve the lives of local people and communities, particularly the most vulnerable, isolated and disadvantaged”, I was keen to find a way Kent Community Foundation, as a grant-maker, could offer a greater level of security and continuity to those projects our donors wished to support.

The answer was endowment funds, which are perpetual trusts allowing regular withdrawals from the income they produce. I thought that if Kent Community Foundation was to encourage others to start such funds, I should set one up myself.

Having sat on the Board of Trustees for the children’s charity, Barnardo’s, and having vowed to help young carers following a particularly heart-wrenching encounter with three extraordinary children looking after their mother, I had a clear idea of who I wanted to help. Becoming a fund-holder through Kent Community Foundation provided me with the opportunity to fulfil the promise I made as I knew, through its network of contacts, Kent Community Foundation could find those young carers who needed support.

This was not something I could ever have done on my own.

All aspects of running a fund are carried out most efficiently by the Kent Community Foundation team. They do all the administration, go out and find and then verify requests from the type of causes in which you are interested before putting them to you, so that your only role is to make decisions on which projects, causes or people you wish to support. As Endowment Fund-Holders we enjoy all the fun of giving without any hassle. It is all pain-free.

Not only this, but as a former stockbroker, I am only too aware of making sound and carefully thought-out financial decisions to make the most of charitable giving.

Initially my wife and I put a quite modest sum of money into our fund but we then added to it on a more or less annual basis, taking full advantage of all the allowable capital gains and income tax breaks offered by HMRC.

Endowment funds, managed by Kent Community Foundation are invested very conservatively, either through CCLA, which runs the Church of England’s assets, or by Sarasin, which is one of the largest and most respected of fund managers.

To make it even more attractive, if you give shares to charity on which you have a taxable gain, you not only avoid any inbuilt Capital Gains Tax on those shares but you also receive all the income tax advantages.’

“

I knew Kent Community Foundation could find those young carers who needed support. This was not something I could ever have done on my own.

Your donation in safe hands

Kent Community Foundation is governed by a large board of experienced trustees who bring a wealth of knowledge and broad professional oversight to our operation.

Several of our trustees have become fund-holders themselves, having experienced first-hand the care and due diligence taken by our team to ensure every penny donated directly impacts on strengthening our local communities.

We fully understand how important it is to know that your money has been used effectively to support local causes you can trust, who will make a difference within the community and use your donation responsibly.





Vicki Jessel

The Hornbeam Charitable Fund

The Jessels are a farming family based in Ashford whose commitment to making a difference spans three generations. The whole family is involved with the Hornbeam Charitable Fund, their family fund with Kent Community Foundation.

'The information provided by Kent Community Foundation is extremely helpful, especially when there are photographs of the groups.

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Seeing the people who could directly benefit from your grant is really inspirational, as you can imagine the work going on during the year.

Our family has enjoyed the challenge of choosing which organisations we would like to support.

Through Kent Community Foundation, we have supported a weekly singing session at the Kent Multiple Sclerosis Therapy Centre;

my sister suffers from MS, this was a particularly poignant choice.

We have also funded projects which support children, young people and families, including Kent County Federation of Young Farmers' Clubs who connect young people from many backgrounds with an interest in the countryside, animals and outdoor pursuits. We know from working with schools in Kent, the benefits of young people being able to work with animals and gain responsibility for looking after them and training them.

Slide Away, who support bereaved children, families and schools, was a very popular choice amongst our family members, along with The Hamstreet Coffee Club as they provide just what we believe is needed for those who are older and more isolated to enjoy some company.

We always look forward to our funding meetings - there is always a robust discussion and as our children grow and experience more of the outside world, they are becoming more attuned to the needs of others; a really positive outcome from our journey in philanthropy.'



Rosalind Riley

The Brook Trust Fund For Kent

Rosalind has lived in Kent for most of her adult life. After working in arts administration (including Kent Opera) she went to drama school and has worked continually in theatre for over 20 years. Her charitable interests include hard-to-fund projects such as domestic violence charities and preventing reoffending.

'When we started our main grant-making foundation, the Brook Trust, we formulated a vision of what we wanted to fund, and how. We wanted to give locally, in a way that really made a difference in our county.

We knew from long involvement in small local groups that many grassroots organisations were doing brilliant work, but they found it hard to raise money through lack of time and experience, and we did not have the time or connections to wade into the sea of "good works" that these wonderful people were carrying out. Kent Community Foundation was a brilliant answer to this problem (they have

their 'tentacles' everywhere!) they got to know us, presented us with causes of all kinds which they knew would resonate with us, and made our giving much more effective and wide-reaching.

I feel I have come to know the county much better through all the small, even tiny charities that we have been able to access through the funders' "dating agency" that is Kent Community Foundation.'

“

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The Lord Sackville DL

Sackville Family Fund and Chair of Trustee

Robert Sackville-West DL is the founding Director, and now Chairman, of Toucan Books and author of the award-winning *Inheritance: The Story of Knole and the Sackvilles*, and *The Disinherited: A Story of Love, Family and Betrayal* (2014). Robert, along with his family, established their fund at Kent Community Foundation in 2019.

'During my first year on the board of Kent Community Foundation, I participated in the work of the Grants Committee. I was amazed by the effectiveness of the organisation; and by the professionalism and rigour with which each grant application is assessed and then, if successful, monitored.

I was so impressed in fact, that my wife and I decided to establish a family fund with Kent Community Foundation. We did not have the time or knowledge to research and back individual charities but knew from first-hand experience that with Kent Community Foundation our money would be well spent.



People often assume that Kent is a wealthy county, but it is also a county of disparities, with some areas and communities suffering great deprivation. More than any other organisation in Kent, Kent Community Foundation really is aware of these social needs, and how and where its funds will have the greatest impact.'



Unity Roots CIC



Faversham Assistance Centre

Setting up your own charitable fund should be simple

Setting up your own charitable fund doesn't need to be complicated. Kent Community Foundation can take care of the administration and obligations for you so giving to your community is always enjoyable and never becomes a hassle.

We start by working with you to understand what you'd ideally like to achieve with your fund. You may have a clear idea of the cause you would like to focus on already (e.g. creating opportunities for young people).

If you haven't got any set ideas yet, that's fine too. We can draw up a shortlist based on the information you share with us, using our expert knowledge of reliable charitable organisations to identify the areas of greatest local need.

You can then decide on the grants you wish to make. Many of our fund-holders like to involve family members in this part of the grant-making process. And one of the benefits of having a named fund with Kent Community Foundation is that it can be passed on to the next generation in the future.

How involved will I be?

Fund-holders can be involved as little or as much as they wish in the grant-making process. Some fund-holders tell us that getting to know the charities they are supporting is one of the most rewarding aspects of giving. Other fund-holders prefer to remain in the background. How much you get involved is entirely up to you.

Charitable funds are an easy, convenient and tax-effective way of giving.



Head in The Game received a grant for their 'Football for Thought' Programme to support men with their mental health and wellbeing.

What type of fund is right for me?

A named fund with Kent Community Foundation can be set up in two ways, depending on the amount you gift:

1 As an Endowment Fund

An endowment fund is invested to produce an annual income which is distributed as grants each year. This is ideal for people who want to provide a lasting legacy for their local community and perhaps leave a legacy of giving with the next generation of their own family.

Endowment fund criteria:

- £100,000 minimum gift is required to set up a named, donor-advised fund with bespoke grant-making

2 As a Flow-Through Fund

This can be set up as a one-off fund or as an on-going fund that is topped up regularly, usually annually. This is ideal if a long-term endowment is unsuitable as it enables fund-holders to put their money to work straightaway. A Flow-Through Fund is distributed in full over a set period of time.

Flow-through fund criteria:

- £50,000 minimum gift to set up a named, donor-advised fund with bespoke grant-making including a fully serviced panel and decision making powers
- £25,000 minimum gift to set up a named, donor-advised fund with bespoke grant-making where decisions on individual grants are made by the Foundation
- £10,000 minimum gift to set up a named fund where grant-making is from one of our five themes and at the discretion of the Foundation

When you set up a bespoke named fund you can choose to make one or more of the following recommendations as to how you'd like your fund to be used. You can:

- determine the purposes of the fund and allow Kent Community Foundation the discretion to make grants in line with local needs
- determine the purposes of the fund and recommend grant recipients from shortlists prepared by our team
- recommend one or more registered charities to be annual beneficiaries of grants
- recommend the fund be used to support Kent Community Foundation activities at our discretion

Giving deserves to be enjoyable for everyone involved

As fund-holders you deserve peace of mind that every penny you gift will be used effectively to support the causes closest to you. That's why we provide you with expert support from community fund management specialists who will guide you through every step of the process.

At Kent Community Foundation you can expect:



Excellence

We strive to achieve excellence in the delivery of our service by exceeding the expectations of both our donors and our grant recipients.



Support

We go above and beyond to support fund-holders by sharing our knowledge and expertise with you to help build a sustainable and confident voluntary sector across Kent and Medway.



Integrity

We operate with integrity in everything we do. We are transparent in our processes and deliver what we promise. You will receive clear updates detailing how your fund has been distributed and what difference it has made.



Brogdale Collections

“

I feel I have come to know the county much better through all the small, even tiny, charities that we have been able to access.

SNAAP (Special Needs Advisory & Activities Project) received funding towards their Family Support Service which provides emotional and practical advice to families.





How Kent Community Foundation makes giving easy for you

As an experienced grant-giving organisation with specialist knowledge of the needs of the county, Kent Community Foundation can offer unique support and value to your giving experience that other fund-management options cannot.

All your admin and obligations taken care of:

When your fund is managed by Kent Community Foundation we take care of any onerous administrative tasks and legal obligations, so you never need to feel burdened. We will set up the fund, put a suitable grant application process in place, advertise your fund and vet all applications; that way you can rest assured applicants we bring to you are viable, respectable organisations who can make a difference.

Your fund tailored to you

Having your fund managed by Kent Community Foundation does not mean less control over how your donations are distributed. We work with you to help you choose causes you feel would benefit most from your donations. You can tap into our

years of experience in this field so you can understand where you can make the most difference to your community.

Get to know your beneficiaries

If you would like be more involved with the causes you support we can help make that happen. We support our fund-holders to build positive relationships with their chosen causes, often meeting the organisations and beneficiaries too. As a fund-holder there is absolutely no obligation to get involved with the cause or causes you choose to support – in fact some of our fund-holders prefer to remain anonymous.

Know you're making a difference

Giving shouldn't feel like a one-way transaction. Part of the joy of giving is in understanding how your actions have helped others. That's why Kent Community Foundation will make sure you receive regular updates on your chosen cause or causes. You will be kept informed on where your donations have gone and how they have been used to make a difference to the lives of local people.

Know your fund is used wisely

Worrying about how donations are spent has been cited as one of the greatest barriers to giving. And it's understandable. No-one wants to find out their donation has been wasted when all you wanted to do was make a difference.

The sad thing is it can happen. That's why we thoroughly consider and check all the voluntary organisations in our network so you can rest assured your donations will always go to credible, fully vetted charities and causes who are just as passionate about making a difference as you.

Find the right cause (or causes) for you

When it's not your area of expertise, understanding what and where the greatest areas of needs are within your local community is not always that easy. Charities don't always have a website or advertise what they do – sometimes it takes insider knowledge of the voluntary sector to uncover the most deserving causes.

As part of the local voluntary sector network, Kent Community Foundation works both with, and in support of, charitable organisations, meaning we will often hear about deserving projects and campaigns taking place that the public may be unaware of. We can help you uncover causes you would otherwise not even know existed so you can make a difference in a way that feels authentic to you.

Kent Community Foundation will support you by:

- providing information on effective giving and local needs
- promoting your fund
- receiving and processing requests for support
- assessing and shortlisting suitable projects to receive grants
- servicing meetings with fund panel members
- awarding grants, then monitoring and reporting on their effectiveness
- claiming any eligible Gift Aid and crediting it to your fund
- investing the fund capital through professional investment managers *[endowment funds only]*
- providing quarterly fund statements



Three steps to getting started with meaningful giving

Kent Community Foundation makes giving simple. To get the ball rolling on setting up a fund with expert support, just follow these three simple steps:

1. Share your vision

Meet our team and share your vision for giving so we can learn more about the areas where you'd like to make a difference.

2. Choose the local causes that matter to you

We'll set up your fund and take care of the administration – while you identify the causes you want to help, from a comprehensively-vetted selection.

2. Make a difference

Enjoy giving, free from the administrative burden of managing your own fund and knowing you're making a difference to your community.

Food Friends tackle social isolation and loneliness in communities through food and friendship, meal and doorstep chat.



‘We did not have the time or connections to wade into the sea of “good works” people were carrying out. Kent Community Foundation was a brilliant answer to this problem.’



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