

# INTRODUCTION WORKING IN PARTNERSHIP WITH PROFESSIONAL ADVISORS

Helping you to **exceed your clients' expectations**

## Northamptonshire **Community Foundation**

As the leading independent grant-making charity in the County we are proud to have delivered vital support to our communities for the last 15 years.

We deliver a variety of funding for the local voluntary and community sector awarding grants of over £1 million annually. We are dedicated to funding community-based action which improves the lives of our county's most disadvantaged people and communities. Child poverty, unemployment, homelessness, domestic violence and social isolation are just some of the issues we strive to tackle each year.

With the help and support of our donors and partners we are able to help the communities where we live, work and play. This Foundation is for the county of Northamptonshire. All funding raised stays right here.

**Paul Southworth OBE DL**  
**Chair of the trustees**

## Quality Accreditation and Governance

Northamptonshire Community Foundation is Quality Accredited by UK Community Foundations. Formally acknowledged and recognised by the Charity Commission for England and Wales, 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 donors 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.**



### Demonstrating the Difference

Northamptonshire Community Foundation has been directly involved in developing and piloting an impact assessment tool on behalf of UKCF, the national network of Community Foundations. The results are a framework which provides compelling evidence of the impact of donor investment in community grant making. From taking a 'bottom up' approach we have also been able to create an impact tool that better enables small and grassroots community groups and charities to build their monitoring and evaluation skills.

We are now able to provide impact case studies across individual awards and donor programmes. The themes, outcomes and indicators of the framework enable the staff team to capture the kind of change that groups are achieving and make us better able to track transformation and communicate this to current and potential donors and the wider community.

Northamptonshire Community Foundation also works in partnership with Voluntary Impact Northamptonshire to better support the groundwork for voluntary and community activity to thrive in local communities. This helps create opportunities for new groups and projects to help provide local solutions to the issues that affect our communities.

## Get involved

There are many ways to support us whether you are an individual, company, trust or local authority, we can provide the solution to your local charitable giving. We will help you make a lasting impact to the issues you care about across our communities.

As a supporter, you can see for yourself the difference your support is making. We make philanthropy affordable, easy to manage, tax and cost effective and as visible or anonymous as each donor requires.

We offer a bespoke philanthropic service and can give advice as to where your support will make the maximum impact in the community.

### WAYS TO GIVE



#### You can also:

- give cash
- transfer shares
- or even donate property

Whatever mechanism suits your circumstances, we will ensure your giving is handled tax efficiently, whether you are an individual, charitable trust or a business.

*You will find information on these aspects of charitable giving within this pack.*

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## Corporate Donors

We offer similar support to corporate donors (including businesses of all sizes, solicitors, accountants and land agents etc) who have an interest in the local community and are interested in putting their corporate social responsibility into practice.

## Charitable Trusts

We can also take on existing charitable trusts that are ineffective on account of difficulties in identifying beneficiaries or attracting new trustees. We provide a range of offerings from assisting with grantmaking to taking over legal responsibilities for the trust completely, yet with clients retaining an interest. You can find out more about that in our information on Charitable Trust Transfers.

## BY WORKING WITH NORTHAMPTONSHIRE COMMUNITY FOUNDATION YOU CAN BENEFIT IN A NUMBER OF WAYS:

### 1. WE ARE LOCAL

Your clients' funds will be used to support the local community in which they live and work. They can visit projects and see for themselves the positive impact that their charitable giving achieves.

### 2. WE ARE IMPARTIAL

You may be reluctant to recommend specific charities to your clients for reasons of impartiality. We do not favour any one particular cause or theme.

### 3. WE ARE FLEXIBLE

With a named family fund (which operates in a similar way to a charitable trust), your clients choose the causes they wish to support. Grants can be made to charitable causes and not just registered charities (for example, improving health and wellbeing or access to learning and improving skills and employability). Clients can change their focus at any time which enables them to respond quickly to emerging social need. Clients can be involved as little or as much as they like in the grantmaking process.

### 4. WE ARE QUICK AND EFFICIENT

We can set up a named fund after one meeting rather than waiting several months or longer to register as a charitable trust.

### 5. WE MAKE GIVING EASY

We promote the fund and invite applications from community groups to fund their project, review grant applications, provide summaries of the projects, check validity and that the charity's or community group's project falls within the Foundation's charitable objectives. We arrange for the donations to be made from the fund and undertake monitoring to ensure the money has been spent on the project and to measure the impact it has made.

### 6. WE ARE KNOWLEDGABLE

We have an excellent knowledge of local community need and can match your clients' interests to specific projects, causes and initiatives.

### 7. YOUR CLIENTS DECIDE WHICH PROJECTS TO SUPPORT

We encourage donors to have full involvement in decision-making including which community projects to support and the level of funding. Ultimately, responsibility lies with the trustees of Northampton Community Foundation and grants can only be made following their ratification.



## BY WORKING WITH NORTHAMPTONSHIRE COMMUNITY FOUNDATION YOU CAN BENEFIT IN A NUMBER OF WAYS:

### 8. WE HELP CLIENTS GIVE TAX EFFECTIVELY

As a registered charity we are an ideal vehicle for all methods of tax-effective giving, offering significant tax benefits for your clients including relief from income tax, capital gains tax, inheritance tax and corporation tax. We can also accept gifts in cash, shares, land, property or other assets which can also be made tax efficiently.

### 11. WE CARRY THE FINANCIAL & LEGAL RESPONSIBILITY

We carry the financial and legal responsibility – setting up 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 under SORP as well as the independent scrutiny of the accounts. With a named fund at Northamptonshire Community Foundation, all these responsibilities lie with our trustees.

### 9. WE ARE HERE TO STAY

If a client leaves a legacy in a will today, it is possible that the charity or cause they wanted to fund is either no longer in existence or in need of assistance by the time their will comes into effect. With a named fund, our trustees have discretion over the distribution of gifts left to them. We can ensure that the original intentions of your client are carried out without having to approach the Charity Commission for a variance of the original deeds of a trust or intentions in a will.

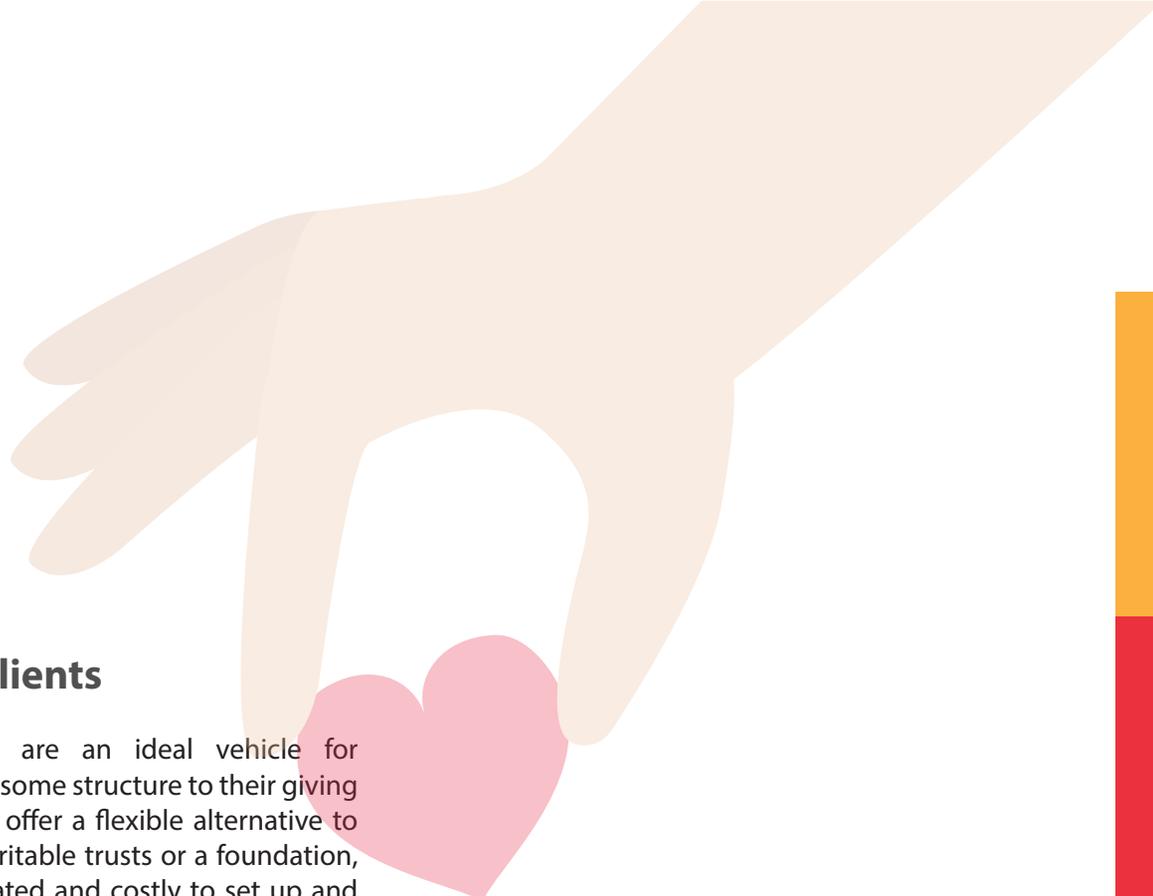
### 12. ABOVE ALL...

Our offering is personalised and very flexible so it is very likely that we will be able to find a solution that meets, and maybe even exceeds, your clients' needs and expectations, which we hope would help to strengthen your relationship with them further.

### 10. WE ARE TRANSPARENT

We ask for a contribution towards own general charitable purposes and management of the fund. This is to cover the set up and ongoing management of the donation for the period from the date of the fund agreement.





## Benefits to **your Clients**

Community Foundations are an ideal vehicle for philanthropists to provide some structure to their giving in a tax efficient way and offer a flexible alternative to creating conventional charitable trusts or a foundation, which can prove complicated and costly to set up and administer. The administrative and governance burden on trustees of running a conventional charitable trust is ever increasing which, understandably, can be off-putting to many clients.

We offer a practical alternative, making charitable giving to local causes stress free, easy and enjoyable for clients, whether the amounts they set aside are large or relatively modest.

We must stress that we believe that there is still a place for the conventional personal charitable trust and, indeed, that may be the donor's preference. In line with the Charity Commission's advice (see insert), our purpose is to ensure that donors are aware of the full range of options available.

Whether your client;



**is looking to establish a named family fund through a lifetime donation**



**or a legacy in their will**



**or wishes to reduce the administrative burden of an existing trust**

we can work with you and your client to find the best solution.

To find out more about **how we can work in partnership with professional advisors, please email**

**Victoria Miles DL: [Victoria@ncf.uk.com](mailto:Victoria@ncf.uk.com)**

or

**Naomi Butters: [Naomi@ncf.uk.com](mailto:Naomi@ncf.uk.com)**

or

contact by phone on **01604 230033**

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Company Registration Number: 4269030



**Northamptonshire  
Community Foundation**  
Giving back to our county