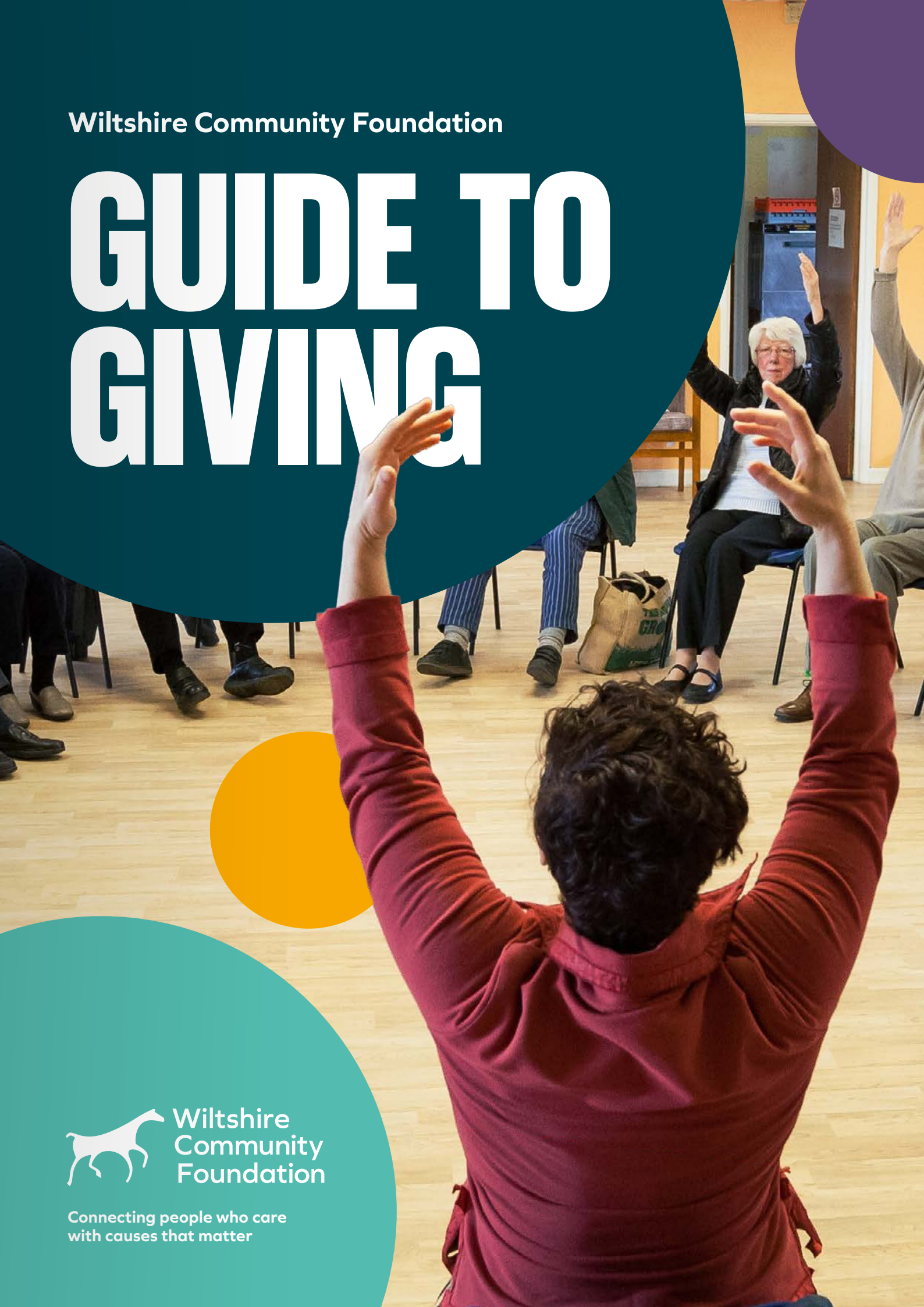


Wiltshire Community Foundation

GUIDE TO GIVING



Wiltshire
Community
Foundation

Connecting people who care
with causes that matter

WELCOME



Working with Wiltshire Community Foundation has not only been easy and seamless, but incredibly enjoyable and rewarding. Their team is a joy to work with at every stage of the process, efficient and obviously genuine and caring people."

— Rachel Smith,
Social Investment Manager, Nationwide



If you have been given this brochure by your professional advisor, a friend or you have requested further information from us then it is already likely that you are thinking about charitable giving in Wiltshire and Swindon.

For over 45 years Wiltshire Community Foundation has been advising individuals, families, businesses and organisations on how they can make a positive difference to the lives of people locally.

Our approach is always tailored and personal, putting your charitable giving objectives, the causes you are passionate about and how involved you want to be at the heart of our partnership. Across these pages you can find out more about the range of giving options we offer and how we can work together to support our communities and enable more people across Wiltshire and Swindon to thrive.



Fiona Oliver
Joint Chief Executive



Vicky Hickey
Joint Chief Executive

CONTENTS

WHY DO PEOPLE GIVE THROUGH US?



WE ARE A LOCAL ORGANISATION

with 45 years' experience and deep roots in the community.

6 About Us

WE ARE EXPERTS IN COMMUNITY NEED

with an unrivalled reach to voluntary and community groups and causes across Wiltshire and Swindon.

8 Understanding Local Need

WE MAKE IT EASIER TO GIVE

as our expert team can handle all the administrative tasks while offering the opportunity for you to be directly involved should you wish.

10 Giving Through Us

“

Wiltshire Community Foundation has the specialist knowledge to make sure our money is used where it matters most and that is important to us. Working in partnership with them takes all the hard work and the guesswork out of giving.”

— Malcolm Gregory,
Partner, Royds Withy King

WE OFFER A RANGE OF GIVING OPTIONS

and a personalised approach so that you can support the causes you care about in the way that is right for you.

11 Giving Options

WE CONNECT PEOPLE TO CAUSES

that matter to them by understanding their wishes and motivations.

14 & 18
Making A Lasting Difference

YOUR GIFT KEEPS GIVING FOREVER

with our endowment model, creating a lasting impact for local people.

16 Our Investment Management

WE WORK WITH YOU

directly or partner with your professional advisor to plan and deliver your charitable giving objectives.

20 Next Steps

ABOUT US



Wiltshire Community Foundation is an independent charity dedicated to tackling disadvantage and strengthening local communities by inspiring local philanthropy and supporting the voluntary sector.

**OVER
£18
MILLION
IN GRANTS
AWARDED
SINCE 1975**

Due to the generosity of local people giving through us, we have grown into one of the largest grant-giving organisations in Wiltshire and Swindon.

Each year we award over £1 million through hundreds of grants to grassroots voluntary and community groups doing vital work in their neighbourhoods. Our education grants also give young people the chance to improve their development, learning and future employment prospects.

We carry out research into local need to ensure our support is targeted where it is needed most. By tackling the most pressing local issues we can help build stronger communities.

As well as financial support we organise events, training and advice sessions to help the voluntary and community sector build their skills, capacity, knowledge and networks.

We believe that to meet the long-term needs of our community, we need resources with longevity so we have a range of ways that people can give. Our giving options are tailored to suit donors' motivations and are effective whether they want to make an immediate impact – or a difference for years to come. Many of our donors have set up funds for the long-term, recognising that pooling their assets achieves more. These funds are invested and each year the returns they generate are made available for grant-making.

Since the Foundation was established in 1975, more than £18 million has been awarded in grants in Wiltshire and Swindon, making a real and lasting difference to the most disadvantaged people in our county.

GRANT STORY

Our grant to **Wiltshire Portage** helped them to support and improve the lives of more children with complex disabilities and special needs by funding a home visitor.

“

Without the grant we wouldn't have the capacity to assess these families to enable them to join our programme.”

— **Kim Hannay-Young,**
Operations Manager, Wiltshire Portage

UNDERSTANDING LOCAL NEED

Wiltshire is perceived as an affluent county and a great place to live. And for many it is. But there is a high degree of inequality across Wiltshire and Swindon, with pockets of extremely high deprivation in our towns and rural areas.

Thirteen areas across the county are ranked among the most deprived 10% in England. Shockingly, one-in-four children in Wiltshire and Swindon are living in poverty and in some areas it is as high as 40%. Wiltshire has a larger proportion of older people than the national average and a quarter of neighbourhoods have high pensioner poverty.

Our children and young people have lower levels of educational attainment than their peers across the country, and fewer pupils go on to higher education than the national average. These two factors mean that we have a higher rate of unemployed young adults than the wider population.

There is a high degree of health inequality across Wiltshire and Swindon, with stark differences

in life expectancies. Mental health is also a significant and growing issue with rates of depression, anxiety and self-harm ranked higher than many parts of England.

Many of these issues have been greatly exacerbated by the pressures of the Covid-19 pandemic and the fallout will be felt for years to come. It is a sad reality that some of our communities face significant hardship and challenges in their daily lives. However, the picture is not all bleak.

Wiltshire has a thriving and dedicated voluntary and community sector who are adept at providing local solutions to local issues. Our expert knowledge of these local groups and the key issues in the county means that we can help you make a difference locally with your giving, helping to improve the lives of our communities.

1 IN 4
CHILDREN
IN WILTSHIRE
AND SWINDON ARE
LIVING IN POVERTY

GRANT STORY

When Sam Wolfson lost his daughter aged just 27 days he found little support for dads, so he founded **Sands United Salisbury**, a football team for men in similar situations. A grant paid for a training pitch for a year and our Funder+ advice helped put the team on a firm footing for the 36 squad members it now supports.



“

The support the Community Foundation has given us with this grant is immeasurable.”

— Sam Wolfson,
Founder, Sands United Salisbury

GIVING THROUGH US

Many people want to give something back to the community where they live and work but are unsure about where to start or where to focus donations to the best effect. That's where a community foundation's professional experience, knowledge of local issues and links with grassroots groups provide a solution.

Our expert team are here to guide you in your charitable giving. We know that no two donors are alike, so we can help you define how you would like to give and identify the issues that you care most about. Whether as an individual, family, business or charitable trust we will work with you to ensure your giving is both effective and rewarding and establish the options that are right for you.

BY WORKING WITH US YOU CAN

Understand the most pressing issues across Wiltshire and Swindon and access a wealth of knowledge to ensure your donation supports communities or causes you care about

Discuss and agree how to meet your charitable goals

Make your gift in the most cost-effective and tax efficient way

Receive comprehensive reporting so that you know where your money has been spent and how it has made a difference

Be confident that we will manage all administrative responsibilities including investments, annual reporting and due diligence over the organisations that you choose to support

Maximise the impact of your gift to make a real difference year on year

GIVING OPTIONS

So, you know more about giving through Wiltshire Community Foundation but practically, how can you do it? There are a number of ways to give and you can choose the best way to suit your circumstances.

ENDOWED FUNDS

Community foundations are specialists in endowed funds, building an asset for the long-term benefit of the local community. Our endowment is made up of multiple funds, set up by people who care about their community and who want to support causes locally. Funds are invested and returns used for grant-making year after year.

Endowed funds are great if you want to:

- **Make a difference over the long-term**
- **Leave a legacy**
- **Create a fund in memory of a loved one**
- **Create a corporate fund rather than setting up your own foundation**
- **Transfer a trust whilst ensuring that its name, aims and objectives live on.**

FLOW-THROUGH FUNDS

Funds can be set up as 'flow-through funds' and used for immediate benefit, with grants awarded straight away, usually within a year, making an immediate impact for the local community. Flow-through funds can be one-off or regular gifts.

MATCH FUNDS

From time to time we have access to match funding which enables you to increase the size of your fund, by attracting additional funds from another source (for example national and local government or another major funder). This is a fantastic way to grow your fund, increase your impact or leverage more money for a specific cause or area.

DONOR ADVISED FUNDS

For larger funds you may want greater involvement, so choosing a donor advised fund means that you can be actively involved in choosing the causes to support. You can be as hands-on or hands-off as you'd like to be – from project visits to groups to simply reviewing applications online. Donor advised funds can be flow-through or invested for the long-term. We work closely with you to understand what you want and to tailor your fund, and our relationship to meet your needs.



GIVING OPTIONS

LEAVE A LEGACY

By making Wiltshire Community Foundation a beneficiary in your Will or part of your estate plan, you are making a valuable contribution to a better future for our communities. We can work with you, or your professional advisor, to ensure that your wishes are met and that your generosity will last for generations to come.

WILTSHIRE CLUB

The Wiltshire Club is designed to bring together those who love Wiltshire to support those most in need in the county. Members make regular annual donations which are combined to create The Wiltshire Club Fund. Annual donations start at a minimum of £500 per person or £1,000 per family. Members of the club will receive regular information on how their support is making a difference as well as the opportunity to attend events both in Wiltshire and London where you can hear about the impact the fund is having.

TRANSFER A TRUST

You can transfer an existing charitable trust to us and we will ensure that grants are distributed in accordance with the spirit of the trust's original objectives, both now and in the future. We take on all the responsibilities for investment, administration and compliance with Charity Law. Trusts can be recreated as a new named fund, with the same name as the former Charitable Trust. The objects of the trust can be retained or amended, and trustees can remain involved if they wish.

BECOME A FRIEND

The Friends of Wiltshire Community Foundation are supporters who help us continue our vital work by making monthly or annual donations. Becoming a Friend gives you a deeper insight into the issues in the county and how we support local communities. Friends receive regular updates on our work as well as invitations to events.

REGULAR AND ONE-OFF DONATIONS

We also welcome gifts from donors who wish to make one-off or regular gifts. You can contribute to a particular themed fund, support one or more named charities or make an entirely unrestricted gift.

WHAT'S BEST FOR YOU?

If you are interested in any of these options, we would be delighted to discuss this with you and/or your professional advisor in more detail.

Please contact us on

01380 729284
info@wiltshirecf.org.uk
wiltshirecf.org.uk

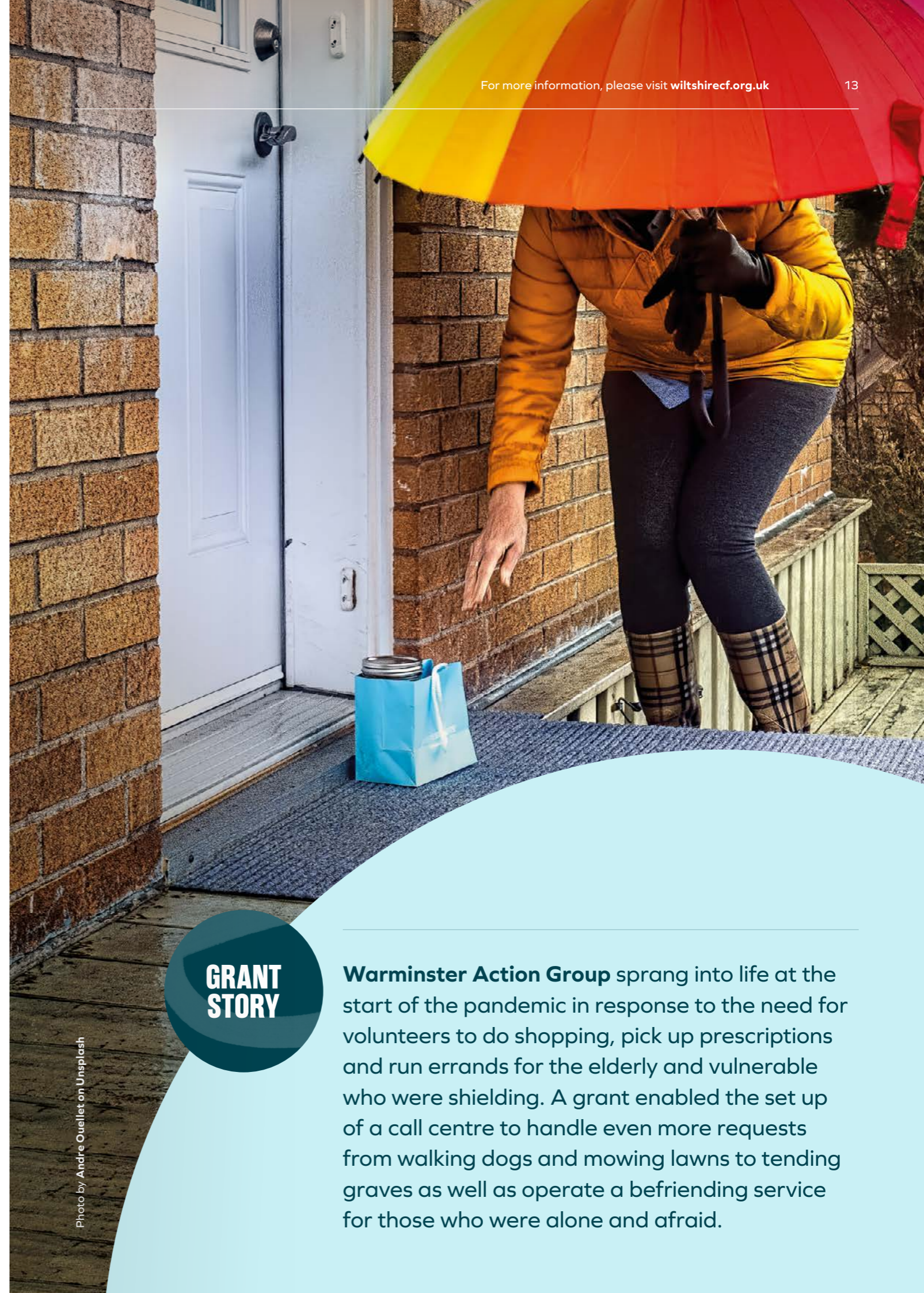


Photo by Andre Ouellet on Unsplash

GRANT STORY

Warminster Action Group sprang into life at the start of the pandemic in response to the need for volunteers to do shopping, pick up prescriptions and run errands for the elderly and vulnerable who were shielding. A grant enabled the set up of a call centre to handle even more requests from walking dogs and mowing lawns to tending graves as well as operate a befriending service for those who were alone and afraid.

MAKING A LASTING DIFFERENCE

PHIPPS FAMILY FUND

James Phipps is an entrepreneur and philanthropist. He was a member of our Board of Trustees from 2018 to 2021. He established the Phipps Family Fund in 2019.

"I was born and brought up in Swindon. It is where I had my business career and where my children were born, so the town is important to me for many reasons. When I sold my business it was only natural for me to want to give back to the area that had given me so much. Previously I would have considered setting up my own foundation but having co-founded a foundation for young people in Wiltshire and Kenya, I didn't want the extra workload or governance and realised giving through Wiltshire Community Foundation would be more cost-effective, time-efficient and yet just as rewarding.

"During my time on the Board I was impressed by their governance and the rigour of the grant-making process, however what is unique is their relationships with grassroots groups across Swindon and Wiltshire and their insight into local need. Their reach and impact are hugely impressive and I knew that I could do more working with them than I could alone.



"I was also really attracted to the idea of an endowment fund as the sustainability of my giving is very important to me. At the time the Foundation had other money available to match my donation so from the start I was able to leverage additional money

to support projects in Swindon, immediately increasing the value and impact of my fund.

"I have a Family Fund as I wanted to involve my children in charitable giving even though they are only young. Each year it's great to be able to review our fund statement as a family, to understand the issues in our local area and see who we have been able to help and the difference it has made. What's even more satisfying is knowing the fund we established will provide a permanent source of funding for projects in Swindon – something I could not have achieved on my own.

“

Their reach and impact are hugely impressive and I knew that I could do more working with them than I could alone.”

— James, Phipps Family Fund

OUR INVESTMENT MANAGEMENT

Our endowment is made up of over 150 donor funds, which are invested to ensure long-term value and to meet our commitment of being an enduring resource for Wiltshire and Swindon.

We use three experienced investment companies – Smith & Williamson, Quilter Cheviot and CCLA – whose objective is to maximise our return over the medium and long-term without taking unnecessary risks.

To harness the collective power of the community foundation network, we have joined with three other community foundations in the South West – Devon, Dorset and Somerset – to invest our endowments.

Whilst we retain our individual identities, we benefit from economies of scale. However, the most significant benefit for all four foundations is the collective knowledge and skills of the financial experts on the co-investment committee, made up of trustees from each foundation, ensuring solid decision making.

We have built a strong working relationship together and while we support different communities with different needs, working together we are able to meet regularly to share and learn in a way that goes beyond co-investment.

“

I was attracted to set up my funds with the Foundation because of its localness, its ability to find the need in the community and its continuity. The permanence of my funds is really important, they are there in perpetuity. It gives me a good feeling to think that part of my funds are being spent every year and there is no reason why that shouldn't happen forever.”

— John Rendell, fund holder

“

The food was really welcome but just as important was the human contact, especially for those who were living alone in a single room.”

— Claire Garrett,
Chief Executive, The Harbour Project

GRANT
STORY

The Harbour Project, which helps 600 asylum seekers and refugees rebuild their lives in Swindon, used a grant to provide food, reassurance and friendship for lonely and isolated families and individuals when its centre had to close during the pandemic.



MAKING A LASTING DIFFERENCE

JOHN COWE MEMORIAL FUND

In 2012, we partnered with Sue and John Phipps to set up the John Cowe Memorial Fund to support groups in Wiltshire and Swindon providing advocacy and supported employment for people with Asperger's Syndrome. Here Sue explains why they choose to work with us.

"We approached the Foundation following the tragic death of my brother, John. He had displayed many symptoms of Asperger's Syndrome and took his own life aged 54. Like many people with Asperger's, he was highly intelligent and a reliable employee. But, in the aftermath of our mother's death, the practicalities of managing by himself were sadly too much of a challenge for him.

"After John's death, we wanted to do something with his legacy to help other adults with this condition struggling to adapt to independent living. We were both aware of the potential pitfalls of setting up a charity ourselves and knew being attached to an existing one in some way would be much easier.

"We knew of Wiltshire Community Foundation and approaching them for help seemed the next logical step. The staff came to meet us to discuss our ideas and helped us to put them into practice. We set the criteria and put forward our own ideas for grant-making and the Foundation agreed to manage our fund, provide ongoing support and maximise the investment.

"It is a relief to know that John's legacy is in safe hands and that someone else is taking care of all administration and governance that comes with running a charity. At the same

time, we have control over how it is spent, and we have had the satisfaction of seeing several projects blossom since the fund was set up."



“

It is a relief to know that John's legacy is in safe hands.”

— Sue, John Cowe Memorial Fund

NEXT STEPS

THINK ABOUT YOUR GOALS

What causes are you passionate about? We can help you to focus your ideas and the types of causes you wish to support.

IDENTIFY YOUR TIMEFRAME

Do you want to see an impact quickly or for many years to come?

CONSIDER YOUR ASSETS

When it comes to charitable giving many people think of cash but you can also give shares, land or buildings.

INVOLVE YOUR PROFESSIONAL ADVISOR

We have experience of working with professional advisors such as solicitors, accountants and wealth managers across Wiltshire and Swindon to facilitate their clients' local giving.

CONTACT US

We would be delighted to discuss your plan with you and/or your professional advisor. Please contact us on

01380 729284
info@wiltshirecf.org.uk
wiltshirecf.org.uk



GRANT STORY

Trowbridge Debt Advice Service were able to provide invaluable advice to people plunged into debt by the pandemic with a grant that enabled them to move their operation online and via telephone. The funds also helped the group to tackle an increase in calls from people on furlough or who had been made redundant as a result of the economic fallout from the crisis.



An aerial photograph of rolling green hills under a dramatic sunset sky. The sun is low on the horizon, casting a golden glow over the landscape. In the foreground, a white silhouette of a unicorn is visible on the grass. The sky is filled with dark, heavy clouds, with the sun breaking through near the horizon.

“

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”

— Margaret Mead

Wiltshire Community Foundation is one of 47 community foundations in the UK.

Community foundations collaborate with private philanthropists, charitable trusts, businesses and the public sector to provide a permanent, flexible and growing source of local charitable funding.

Wiltshire Community Foundation

Sandcliff House,
21 Northgate Street,
Devizes, Wiltshire
SN10 1JT

01380 729284

info@wiltshirecf.org.uk

wiltshirecf.org.uk

Registered Charity no. 1123126
Company Ltd by guarantee no. 6504318



Registered with
**FUNDRAISING
REGULATOR**



**UKCF
MEMBER**