

Working with Professional Advisers

Hampshire & Isle of Wight
Community Foundation

*Enabling
Communities
to Flourish*



HiWCF
LOCAL GIVING FOR LOCAL NEEDS

Contents

○	About us.....	2
○	Understanding local need.....	3
○	Helping you to help your clients.....	4
○	Creating a charitable fund with HIWCF.....	5
○	Creating a corporate charitable fund with HIWCF.....	6
○	Impact through corporate partnerships.....	7
○	Choosing the right fund for your client.....	8
○	Creating a charitable trust versus setting up a charitable fund.....	9
○	Legacy giving.....	11
○	Making a lasting difference.....	12
○	Charitable trust transfers.....	13
○	Our approach to investment & finance.....	15
○	Give Together, Give Local.....	16
○	Get in touch.....	17

About us

We specialise in local and hyper local grant making in Hampshire, Isle of Wight, Portsmouth and Southampton. We fund and support individuals and local organisations working with under-represented communities and groups, particularly communities in low socio-economic areas.

Quite simply, we champion local people and services. And when advice, encouragement and funding is needed, we're there to support.

We have over 20 years' experience managing Charitable Funds on behalf of generous people, businesses and charitable trusts. Whether your clients want to give in their lifetime, or with a gift in their Will, we'll provide free, impartial philanthropy advice.

We will provide the insight, sound management, due diligence and administrative support services needed to make charitable giving easy, efficient, tax-efficient and robust.

More than this, we provide donors with an excellent outlet for their philanthropy and the ability to see the impact of their giving without the need to set up their own charitable foundation.

For those who decide to give through us, we'll manage all aspects of their giving on their behalf, in line with their wishes. We expertly direct our donors' giving for maximum impact so they can simply enjoy the rewards of giving back, knowing their generous gifts are being used well.

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By working with HIWCF, you'll be helping to support the smaller and lesser known charitable and voluntary groups that carry out vital work across our communities to help those less fortunate. Our promise to donors is that their contribution will go straight to where it is needed and will do the most good.”

**- Amelia Riviere DL
Chair of HIWCF Trustees**

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Understanding local need

Enabling communities to flourish

Eighty-one areas in Hampshire and the Isle of Wight fall into the 20% most deprived areas in the country.

Southampton and Portsmouth have the highest levels of deprivation, with the Charles Dickens ward in Portsmouth identified as one of the most deprived areas in the whole country.

Escaping low income, social exclusion and experiences of deprivation can also be more difficult for those in rural areas where people can struggle to access the support services they may need.

Recent data from Hampshire Health and Wellbeing Board showed that living in a deprived area can affect a person's life in several ways, including life expectancy, academic results and future work development.

It was found that life expectancy varies by up to 11 years between the most and least deprived areas in Hampshire and the Isle of Wight.

That's why our support is crucial. As a locally based grant maker, with a strong understanding of the distinct and changing needs of communities in Hampshire and the Isle of Wight, we offer donors the opportunity to ensure that their charitable giving makes a huge – and ongoing difference to the lives of people in need.



Helping you to help your clients

Giving with impact

There's growing demand for high-quality advice and guidance on charitable giving.

Research by the Charities Aid Foundation found that: more than half of 18–34 year-old high-net-worth clients and half of 35–54 year old high net worth clients say an adviser could help with their philanthropy and yet only 5% of advisers are 'very confident' discussing philanthropy.

Many local firms don't have the ability to provide bespoke philanthropy advice in house.

That's where we can help. We're a free philanthropy service, helping you go the extra mile for your clients.

Our friendly team can provide high quality, impartial advice on charitable giving and guide your clients to the best way to make a difference.

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The community foundation plays a hugely important role in helping us understand which organisations are out doing great work and can then help us to deliver against our strategic goals of helping to address the barriers to social and financial inclusion.

- Sharon Orr, Social Impact Manager
Vanquis Banking Group

We work with a variety of solicitors, accountants, financial planners and tax professionals, helping their Hampshire and Isle of Wight based clients to give locally and – most importantly – give effectively.



Whatever your client's interests or goals, we're here to help them change the world on their doorstep.

Creating a charitable fund with HIWCF

Creating a Charitable Fund with us is a simple alternative to setting up a Charitable Trust. Donors can decide how they'd like their funds to be spent, and our team will manage everything on their behalf.

We know that one of the biggest barriers to giving is knowing where to start: finding worthy causes, making sure donations make a difference and managing the administration can feel overwhelming. That's where we can help.

As an individual or as a family

Our friendly team can provide free, impartial advice on charitable giving and guide donors to the best way to make a difference. Our unrivalled breadth and depth of local knowledge means we can identify where the need is greatest and direct your giving for maximum impact.

Funds can be set up with gifts of money, shares, property or other investments, and clients can give in their lifetime, through a business, or with a gift in their Will.

We can help involve family or other loved ones in their giving whether in their lifetime or after they are gone. Giving as a family can be a wonderful and life-enhancing experience. Many families find it is a wonderful way to bring generations together and share in the joy of supporting causes that matter to them and helping others in our community

We're a registered charity, which means your clients can benefit from tax relief when they give through Hampshire and Isle of Wight Community Foundation.

Our expert team will:

- Invite donors to our inspiring events to hear from local charities and meet other like-minded supporters .
- Help donors create a giving strategy based on their values and interests, guided by local need.
- Arrange opportunities for donors to visit or get involved with the causes they support or help donors remain completely anonymous in line with their wishes.
- Carry out due diligence and make grants on the donors' behalf.
- Take care of reporting to the Charity Commission, including the annual report and accounts.

Creating a corporate charitable fund with HIWCF

We partner with companies to help them achieve their charitable and Environmental, Social and Corporate Governance (ESG) goals. Corporate giving, employee volunteering and sustainability are some of the most important ways to demonstrate a company's values and create a great employee experience.

As a company:

We will sit down with your client to understand more about their company, its values, previous experiences of charitable giving and the causes and places they're interested in supporting.

Alongside social impact, corporate giving can benefit client relationships, staff recruitment and retention and employee wellbeing. Ultimately, giving back can be a key pillar in supporting a business' growth and development.

Setting up a corporate Charitable Fund with HIWCF is a simple alternative to running a Corporate Foundation, offering all the benefits without the time-consuming administration.

Our expert team will:

- Share opportunities for networking events with local charities and business leaders.
- Help devise a grant giving programme that is appropriate for the company.
- Organise project visits.
- Provide case studies and a bespoke annual Impact Report, support with PR and social media engagement to promote your clients' social values and raise brand awareness.
- Give guidance on how to best engage employees through charitable giving.
- Carry out robust due diligence and ensure donations are well spent.
- Help create a giving strategy based on company values and employee interests, guided by local need.

Impact through corporate partnerships

We partner with businesses in Hampshire, Portsmouth, Southampton and the Isle of Wight to help achieve their charitable and Environmental, Social and Corporate Governance (ESG) goals. We help them to strategically plan their support for their local community either through setting up Named Funds or through targeted grant giving.

Our Partnership with Moneybarn

Supporting Employability & Skills

Nearly a quarter of children in Portsmouth live in poverty, making them more than twice as likely to fall below expected levels of reading and writing than their peers from wealthier homes, by age 11.

Moneybarn's fund provided vital funds to organisations improving employability and skills. One organisation they support is The Literacy Hubs' Pompey Pirates Club in Portsmouth which supports school children in a relaxed setting where they learn to love reading. Time with dedicated staff and volunteers has had a big impact on nine year old, 'Sam' and his classmates.



Choosing the right fund for your client

Setting up a fund with the Hampshire & Isle of Wight Community Foundation is quick and easy. It can be tailored to your client's wishes and the causes they care about. It is like having your own charitable trust but without the hassle and cost of administration and regulation.

We offer two kinds of Charitable Fund. Our team will help your client decide which Fund is the best fit, based on what your clients would like to achieve with their giving.



Endowment Fund

Creating an Endowment Fund is a wonderful way to make a long-term commitment to the local communities in Hampshire, Portsmouth, Southampton and the Isle of Wight.

Endowment donations are invested with professional investment companies, with a view to long term growth, whilst also providing for annual grant making.

An Endowment Fund creates sustainable funding for our communities to change lives today and for generations to come.

We work with your clients on a giving strategy to plan how they would like to use their grant funding.

Flow-through Fund

Funds can be set up as Flow-through funds and be used for immediate benefit with grants awarded straight away, usually within a year. They give an immediate impact to the local community.

Flow-through funds can be set up with a one-off gift, or through regular gifts into the Fund that align with the giving strategy.

Depending on the size of the fund, we can either advise your client on organisations to support through the Fund, or we can run an open grants programme where the fund is named, advertised and organisations apply for funding through our website.

Creating a charitable trust versus setting up a charitable fund with HIWCF

Many people come to us when they are considering setting up a Charitable Trust and want to understand the pros and cons of each option. The table below outlines some of the main differences between each service.

	Standalone Charitable Trust	Charitable Fund Managed by HIWCF
Set up process	Must register as a charity, apply to the Charity Commission and appoint a board of Trustees. May take weeks or months.	All handled by HIWCF and can be set up in a few days.
Set up and running costs	Initial set up legal costs of around £1,000 – £2,000, with ongoing audit fees which typically range from £1,000 – £3,000. If you require professional administration of grant-making, you will need to pay additional fees to someone to do this for you.	Endowment Funds: 5% donations on entry into the Fund and 1.5% of the value of the fund annually in our fees. Flow-through Funds: 10-15% of donations to the Fund. These fees cover all aspects of our service to you, apart from investment management fees for Endowment Funds.
Reporting and compliance	Trustees must maintain all financial records, prepare accounts and submit to the Charity Commission.	HIWCF will take care of reporting to the Charity Commission, including the annual report and accounts.
Governance and succession planning	Must appoint Trustees and ensure effective governance. If Trustees step down, pass away and cannot be replaced, the charity must find new Trustees or risk becoming dormant.	HIWCF has robust governance in place with a board of 14–15 Trustees chosen for their diverse skill set and professional expertise. As a charity, we are designed to be here forever, so your funds will always be well managed.
Philanthropy advice	Must source professional philanthropy advice as needed, likely on a consultancy basis.	We include expert philanthropy advice as part of our service with no extra fees.
Feedback, monitoring and evaluation	Must gather own feedback, monitoring and evaluation data.	All grantees are required to provide feedback on the impact of their funding and we make funding decisions influenced by data and community insight.

	Standalone Charitable Trust	Charitable Fund Managed by HIWCF
Due diligence	Must be carried out by Trustees.	Thorough due diligence is carried out as part of our service to ensure organisations are well-run, effective and meet their regulatory requirements.
Donor influence and control	Trustees have complete control over how funds are spent.	You have control over how funds are spent or delegate spending decisions to our expert team.
Flexibility to fund different organisations / individuals	Most charitable trusts can only fund registered charities. Can fund individuals if built into charity's constitution.	You can fund a range of charitable organisations including social enterprises, Community Interest Companies and Community Benefit Societies, as well as make grants to individuals.
Investment management	Trustees will need to appoint their own Investment Managers.	HIWCF's professional Investment Managers will manage donor funds. We have specialist Trustees with investment and accounting backgrounds who scrutinise investment performance quarterly.
Engaging with charities	Trustees will need to build these relationships themselves.	HIWCF can organise project visits, meetings and collate feedback for impact reports, meaning you can have as much or as little involvement as you wish.

Legacy giving

Supporting us with a legacy gift is a wonderful way to make a lasting impact on the local places and causes that matter to your clients. Our dedicated team will carefully carry out their wishes, making sure donations make a difference to the lives of local people.

HIWCF is able to manage legacies of all kinds: residuary, reversionary, pecuniary, land shares, property and specific items, stocks and shares.

We offer a range of options for donors to achieve their wishes.

Memorial Fund

Funds can also be Memorial Funds with a specific focus to remember a loved one.

This type of fund can be set up in a matter of days and clients can raise funds for depositing and holding in the fund.

Supporting locally

By naming Hampshire and the Isle of Wight Community Foundation as a beneficiary in a Will, funds can be used across Hampshire and the Isle of Wight to support a range of good causes and respond to urgent need.

Named Fund

Your client can create their own Charitable Fund which will support Hampshire and the Isle of Wight's communities forever.

Donors can choose how they'd like the funds to be spent and we'll ensure their wishes are carefully carried out.

Ultimately, the Fund will award more in grants than the original investment while preserving this precious resource for the region for generations to come.



Making a lasting difference

The Charles Burnett Memorial Fund

Charles Burnett (1956-2018) lived near Lymington in Hampshire and was well known locally as the land-speed record holder for a steam-powered car, which he had developed at his house along with a team of engineers.

The Charles Burnett Memorial Fund was established by his family to assist charitable projects and resources across the area where he lived. In his lifetime, Charles supported many worthwhile causes and this Fund continues his legacy, keeping his memory alive.

The Fund launched in 2020 offering grants from £1,000 to £25,000 to not for profits based in Hampshire and the Isle of Wight.

Charles was a generous philanthropist, supporting many local charities in his lifetime and he had a particular passion for the environment, animal welfare, education, history, medical advancement and technology. The £1 million Memorial Fund supports key sectors and areas of interest to Charles.

From impossible to 'I'm possible'



“

I had hit rock bottom and my confidence was at an all-time low because of endless job rejections and blows to my self-esteem. Positive Path has transformed my life and for that I'm eternally grateful.

Josh
Positive Path Foundation

Positive Path Foundation

Supporting employability & skills

Josh is autistic and had long-term struggles with employment and life in general, leaving him unemployed, and feeling anxious and defeated.

Funding from the Charles Burnett Memorial Fund enabled Josh to join an Employability Scheme offered by Positive Path Foundation and Minstead Trust. With new found confidence, Josh landed a theatre job and now has an exciting future full of possibilities.

Charitable trust transfers

Breathing new life into dormant trusts

There are thousands of charitable trusts across the UK that are either dormant or inactive. Local charitable trusts are an invaluable source of funding for our communities, but running a charitable trust means a great deal of administrative and regulatory responsibility – particularly for volunteer Trustees. We have a wealth of experience of supporting charitable trusts where the charity is concerned about:

- Trustee succession - not being able to recruit new Trustees when current Trustees step down or retire.
- The objects of the Trust being overly narrow, making it difficult to spend funds.
- Being able to meet their administrative or regulatory requirements, such as reviewing applications, carrying out due diligence or reporting to the Charity Commission.
- Identifying beneficiaries or spending funds.

Working with the Charity Commission

The Charity Commission's Revitalising Trusts programme helps charitable trusts that may be struggling to spend their income. It also aims to help reinvigorate dormant or underused trusts for the benefit of communities.

Through the programme, the Charity Commission recommends that Trustees work together with their local Community Foundation to bring funds back into community use. This gives us direct links to the Charity Commission to help fast-track the transfer process and ensure we have step-by-step support to make it easy and smooth for Trustees.

The initiative has so far unlocked £32 million of dormant charitable funds and helped 1,800 charities bring funds back into use for communities.

Our Charitable Trust Transfer Service offers a simple and convenient way for Trustees to secure the future of a charitable trust. By transferring the trust to HIWCF, Trustees can ensure the charity can continue to carry out its objects for generations to come.

If Trustees aren't quite ready to transfer the trust in its entirety, we also provide grant-making services. We can run your clients' funding programmes, or run the entire charitable trust for your client, depending on their needs.

Unlocking community impact

Professional advisers can play a key role in helping us achieve impact while ensuring long-term sustainability of otherwise dormant trusts. The Hampshire Playing Fields Fund is a wonderful example of how our approach can revitalise charitable assets for community benefit.

The Hampshire Playing Fields Association, which had been supporting local access to outdoor spaces and community sports for many years, was incorporated into HIWCF in 2020. As part of this process, HIWCF took over the administration of £584,500 in charitable assets and ensured that these funds continued to support grassroots sports and physical activity across Hampshire and the Isle of Wight.

Since then, we've launched the 'Get Active, Get Involved' grant programme, continuing the legacy of the Hampshire Playing Fields Association and helping to distribute 12-month grants of £1,000-£3,500 to not-for-profit community organisations delivering inclusive and accessible sports and physical activities.

Beneficiaries of these grants have included walking groups, wheelchair sports clubs, dance classes for preschoolers, and local football and rugby teams. By managing the fund within HIWCF, the charitable objectives of the original trust are not only preserved but enhanced, ensuring funds are efficiently distributed and aligned with the region's evolving needs.

How you can help

The Hampshire Playing Fields Fund is just one of many success stories demonstrating how a trust transfer can breathe new life into charitable assets. By transferring a trust to HIWCF, professional advisers can help their clients ensure their charitable giving remains effective and impactful for generations to come.

If you advise on charitable trusts and are exploring options for a more sustainable and efficient approach, HIWCF is here to help.



Our approach to investment & finance

Flow-through Fund Costs

We typically ask for a charitable contribution of 10-15% of the value of donations into Flow-through Funds, including any Gift Aid we claim on your client's behalf.

We are always happy to discuss these costs with you and can offer flexibility depending on the size and complexity of grant making for the Fund.

Endowment Fund Costs

We typically ask for a charitable contribution of 5% of the value of the Fund on set up, usually deducted from the initial donation.

We retain 1.5% of the Fund's value annually to cover the Fund's running costs. This is deducted from the Fund's income before grants are made.

Investment Approach

We carefully invest donations into Endowment Funds with a view for long term growth.

We manage our investments through two investment companies, both of which are instructed to have due consideration of ESG values when managing our funds.



These contributions help us to provide funding for our communities, give advice and support to hundreds of local charities every year and raise awareness of local need across the region.

Give Together, Give Local

*Making a bigger impact by
teaming up with others*



Our Give Together, Give Local campaign offers a powerful way for people to come together and make a bigger impact with their giving across Hampshire, Portsmouth, Southampton and the Isle of Wight.

At the heart of everything we do is a commitment to tackling Poverty & Inequality – our golden thread that runs through all our funding. Whether it's supporting a domestic abuse service, funding an advice service in a deprived area, or helping a grassroots group tackle youth disengagement or mental health issues, our goal is to reduce disadvantage and open up opportunities. We aim to create a positive impact in individual lives, knowing that they can have a ripple effect, creating better connected, stronger and more resilient communities that are thriving.

It's this local, place-based model that makes HIWCF so effective. We're rooted in the area and communities we serve, we work collaboratively with local umbrella and infrastructure organisations to understand the organisations working on the ground, and we work hard to keep our processes accessible and proportionate for small groups.

By teaming up with others who care about the same communities and causes, support for vulnerable people in our region is amplified.

How to donate

Donations to these funds can be made instantly through our website.

All donors will get an annual Impact Report showing how their donation has made a difference, with inspiring impact stories from charities they've supported.

HIWCF will take a 10% fee to manage and allocate all donations.

Get in touch

Hampshire & Isle of Wight 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.

If you would like to discuss yours or your client's philanthropy with us, we would be delighted to meet with you.

Contact our Philanthropy Team:
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