



**Jersey  
Community  
Foundation**

# Guide to Giving

Connecting people who care with causes that matter.





Community Foundations connect local sources of philanthropy with local charitable partners to deliver funding programmes that target local need.



*With the kind and charitable permission  
of Andy Le Cresley Photography.*



# Welcome

It is our hope that Jersey can become a community that effectively distributes its considerable wealth and kindness to causes that matter most to both donor and society. Charitable organisations, so crucial for enriching and supporting our community, are deeply reliant on income from philanthropic giving and this is especially true of the local organisations we serve.

At Jersey Community Foundation, we offer a variety of grant-making programmes funded by donations from individuals, families, businesses as well as grants from our local government. Our extensive work with local charities and research within the local community, coupled with our experienced Board of Directors and sector-specific advisors, gives us the insight and authority to place funds where they will have the greatest, on-Island impact.

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 in

2022 – the first of its kind in Jersey – provides the basis for a strong, evidence-based approach for our future grant-giving activity.

The pandemic showed us that things can be done differently, and it has given many of us a renewed sense of community. We must build on the positive trends that have taken hold in the philanthropy and grant-making sector.

At Jersey Community Foundation, we are here for everyone who wants to support our local communities: for people who are able to give now, leave a legacy for the future, and for the next generation of givers.

We look forward to helping you through your giving journey and thank you for your time, generosity, and community spirit.

Anna Terry  
CEO, Jersey Community  
Foundation

Nick Kershaw  
Director and  
Co-Chair





# About us

The Jersey Community Foundation is an independent grant making charity dedicated to meeting the needs of our local community. We work with charities, voluntary organisations and individuals to enable positive change in the lives of thousands of people on our Island.

We strive to make the experience of giving as smooth and as impactful as possible, for both the donor and recipient charities. Through research and by engaging specialist advisers, we ensure that positive, measurable outcomes are embedded in our grant-giving process.

We work in partnership with our donors to provide an expert service. We ensure their giving goes to worthwhile causes in the areas they are passionate about, whether that be supporting older people, those with disabilities, helping young people with education and training, local sporting projects, heritage, arts and culture or the environment.

We employ a small team of professional staff who support our Board of Directors in developing our supporter base, making grants, researching the local needs, and ensuring the proper financial administration of the Foundation.



We work with charities, voluntary organisations and individuals to enable positive change in the lives of thousands of people on our Island.





# Jersey Community Foundation

take care of all management and administration tasks to make sure charitable giving is a straightforward and fulfilling journey.





# Why give through us?

“Giving with the Jersey Community Foundation is designed to be as simple as possible. We trust their expertise and value their personal approach to setting up funds.” **Donor**

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 charitable trust takes time and requires specialist knowledge. You need to take steps to ensure your money is used effectively and with credible organisations within the community.

In Jersey, there are over 500 charitable organisations, so it can be difficult to find the time and expertise needed to approach giving efficiently. The prospect of daily and on-going administration relating to the trust can also seem daunting.

You may wish to give back to the community in which you live and work but may be uncertain how best to do this.

## **By partnering with us you can:**

- Discuss and agree how to meet your charitable goals
- Access a wealth of local knowledge to ensure your gift supports causes you care about
- Make your gift in the most cost-effective and tax efficient way
- Be confident that we will carefully manage all the administrative responsibilities including due diligence over the organisations that you choose to support, annual reporting and investments
- Maximise the impact of your gift to make a real difference year after year

# Your donation is in safe hands

Jersey Community Foundation is governed by a board of experienced Directors who bring a wealth of knowledge and broad professional oversight to our operation. In addition to our Board of Directors, the Foundation works with Advisers with sector specific expertise. These advisers support the Foundation in both reviewing grant applications and developing its sector specific strategies. Advisers are comprised of sector experts and people with 'lived experience'/reflective of the wider community.

## **Giving Options**

We can discuss your giving options to ensure the communities or causes that you care about benefit from your charitable gifts.

**Endowment funds**

**Annual (or flow-through) funds**

**Themed Funds**

**Jersey Community Fund**

**Supporting our ongoing work**

**Legacy & Memory Funds**





In Jersey, there are over 500 charitable organisations, so it can be difficult to find the time and expertise needed to approach giving efficiently.

# Fund Types

**The principal fund type is the Named fund set up by an individual, a family or an organisation, often in the donor's name or that of someone or something with whom they feel closely associated.**

**There are two models for Named funds:**

## Endowment Funds

A capital sum is invested into an endowment, and the income generated is used to support charitable activities each year. Funds can be established as a one-off donation or built over a number of years. Endowments provide a fantastic long-term investment, allowing donors to continue giving for years to come.

## Annual (or flow-through) Funds

You make a donation to your fund which is immediately available for awarding grants to local projects. Our team will work with you to understand your passion and aims and will then put forward grant applications for your consideration on a regular basis. Flow-through funds are usually topped up annually. The options for Named Funds are set out below:

- **Donor advised** – include individual and family funds, corporate funds and funds established in partnership with charitable trusts and foundations. Donors may nominate groups to receive grants or make recommendations from shortlists prepared by the Foundation in line with their wishes.
- **Panel advised** – as above, but where the donor wishes a panel or advisory group to recommend grants on their behalf.
- **Unrestricted** – the fund's revenue supports the Foundation's operating costs, or its general grant-making as determined by the Board.
- **Field of interest** – the fund's revenue supports the donor's preferred causes at the Board's discretion.
- **Agency** – where the fund is set up solely to benefit a named organisation.

“The Foundation is proud to work in partnership with our donors to provide an expert service to ensure that their giving goes to worthwhile causes in the areas they are passionate about”.





## Themed Funds

As an alternative to establishing a donor-advised fund, you can collaborate with other donors and contribute to one of our collective giving funds. These funds pool donations from a number of donors who all share the same passion for a particular cause.

Alternatively, the Foundation can work with you to identify your areas of interest and then circulate any potential funding opportunities that resonate with your chosen theme, charity or cause.

## Jersey Community Fund

Collective giving to support community need in Jersey.

Our Jersey Community Fund makes grants to community groups in Jersey. 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. Throughout the year, the Board of the Jersey Community Foundation allocate grants from this fund to impactful local charities, focusing on the current needs in the Island.

## Supporting our ongoing work

Supporting the day-to-day essential resources of running the Jersey Community Foundation will enable us to strengthen and grow the vital work we support across the Island. By donating to us this way, you can help us reach as many people in need as possible.

**The Foundation will work with you to establish your aims and areas of interest and will advise on the most appropriate model depending on the level of gift, likely fund revenue and the amount of engagement the donor wishes.**

**Whichever option you chose, we will help you discover incredible local projects making a difference on your doorstep, and you have the peace of mind knowing that our team have thoroughly assessed each project, prior to your consideration of awarding a grant.**



We understand that the decision to leave a legacy is a big one, that's why we ensure every penny you give goes as far as possible.





# Legacy & Memory Funds

Whether you are looking to leave a charitable legacy in your will or to commemorate a loved one, we can help to ensure your gift has a lasting impact.

## Leaving a lasting legacy

We understand that the decision to leave a legacy is a big one, that's why we ensure every penny you give goes as far as possible. By offering a bespoke tailored service to donors we can work with you or your loved ones to ensure your wishes are fulfilled.

You may choose to ask the Foundation to allocate your gift to one of our existing Themed funds. Alternatively, you may decide to create a named fund to support your own particular charitable interests as well as ensuring your name lives on in the future. If you wish, this option allows your family to have an input on how the funds are distributed too.

Whichever route you choose, by using the Jersey Community Foundation to help you manage your legacy you can be confident that the money you leave will always be used wisely.

## Remembering a loved one

Many people wish to remember a colleague or loved one by setting up a charitable fund in their name to support good causes. The Jersey Community Foundation can help establish a Memorial Fund, in commemoration of a loved one, providing family and friends with a personal focus for special memories.

A Memorial Fund enables you to create a lasting legacy for your loved one, tailoring the fund themes and criteria to best represent causes close to their heart.

## Benefits of a Jersey Community Foundation Memorial Fund

- A Memorial Fund can be set up in a matter of days
- You can raise funds and collect donations into a single fund that can support a wide range of charities, community groups and organisations
- We can offer advice on how to make your donation tax efficient

# Professional Advisers

We can work with Lawyers, Accountants, Financial Advisers and Wealth Managers to provide advice and support relating to the philanthropic needs of their clients.

As individuals' understanding of social needs and their role in supporting their own communities increases, there is growing interest to learn more about philanthropy and effective charitable giving and the options available to them. Good advice in this area is important.

## Working with you to support your clients

Working together with you, we can provide a fully inclusive offering to help you meet your clients' charitable goals and exceed their expectations in terms of the range of options available to them. Together, we can ensure that your clients' charitable giving meets the causes they wish to support.

We provide a range of options for private clients who are interested in:

- Leaving a legacy or gift in their will
- Setting up a personal fund
- Transferring the burden of running a charitable trust\*

## Benefits to your clients

Community Foundations are an ideal vehicle for donors 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 and can work with you and your client to find the best solution.

*\*We can assist existing charitable trusts who are unable to put their funds to full use, either because of having difficulty identifying beneficiaries or not being able to recruit new trustees. We provide a range of options from assisting with grantmaking to taking over the legal responsibilities for the trust completely, yet with clients retaining an interest and involvement, should they wish.*





Working together with you, we can provide a fully inclusive offering to help you meet your clients' charitable goals and exceed their expectations in terms of the range of options available to them.





# Getting Started as a Donor



## **Start your Journey**

We can help you decide whether you should create your own fund or start your giving journey with our Jersey Community Fund.



## **Think About Your Goals**

We can help you and your family or staff think about your passions and the causes that matter to you most.



## **Choose What You Want To Support**

Whether you are interested in a specific area of need or a particular type of organisation or community, we can help you focus your ideas.



## **We Can Work With Your Professional Adviser**

We can work with Lawyers, Accountants, Financial Advisers and Wealth Managers to provide advice and support relating to your philanthropic needs.

We would be delighted to meet with you and/or your adviser, to talk things over.







# FAQ's

## **Are my dealings with the Jersey Community Foundation confidential?**

Absolutely. All information is kept strictly confidential. You can choose whether or not to be identified in any documentation and your grants may also be made anonymously.

## **Can I leave a gift to Jersey Community Foundation in my will?**

Yes. We can work with you and/or your Professional Adviser on various options to ensure that your wishes are honoured.

## **Who makes the decisions about which charities our charitable funds will support?**

Our Board makes decisions on Field of Interest grants based on parameters set by you. You make the decisions on Donor Advised Funds grants, or you can delegate that decision to us. Either way you can be assured that the Jersey Community Foundation Board oversee all grants made by the funds we manage.

## **Can I involve my family in the decisions about my fund?**

Yes. We will be delighted to work with your family, now and with future generations.

## **What if I just want to support local projects without creating a fund?**

You can start your journey with us by giving directly to our Jersey Community Fund which is used to support a broad range of organisations tackling issues in the Island. If, at any time, you decide that you want to be more specific about where your giving is spent, we would be delighted to help you to create your own Fund.

## **To discuss the right option for you, contact Anna Terry, CEO:**

[anna@jerseycommunityfoundation.org](mailto:anna@jerseycommunityfoundation.org)







# Why choose the Jersey Community Foundation?

Community Foundations bring together philanthropists with dynamic local organisations who need funding and other resources.

- We are a local organisation with a broad knowledge of community issues and needs.
- We work with a number of Advisers, with sector specific expertise, to support us with our grant making and in developing our sector specific strategies.
- Our Advisers are comprised of sector experts and people with 'lived experience'/ reflective of the wider community.
- We have a wealth of knowledge of the charity and community sector in Jersey.
- We bring together ideas and resources to create positive, lasting change.
- We provide personalised options, tailored to meet your individual charitable and financial goals.
- We offer various ways for you to give, so that you can support the causes you care about.
- We can partner with Professional Advisers to create planned approaches to charitable giving.
- We handle all administrative tasks making it easy for you to give.
- We offer you all the tax advantages of giving to charity.
- We help you create a personal legacy for lasting impact.
- Our endowment model means your gift keeps giving forever.

Connecting  
people who care  
with causes that  
matter.



**Charity number:** 346

**Company number:** 131479

**Registered in Jersey**

**Email:** [development@jerseycommunityfoundation.org](mailto:development@jerseycommunityfoundation.org)



**Jersey  
Community  
Foundation**