

From: Community Foundation Network [advisernews@communityfoundations.org.uk]

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To: Fran Walker

Subject: Professional Adviser Ebulletin, July 2009



CFN Professional Adviser Ebulletin July 2009

www.communityfoundations.org.uk

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Dear Fran

- [Tell us what you think - Manifesto for Community Philanthropists](#)
- [There's still time to treble your clients donations](#)
- [The Beacon Prize - the 'Nobel Prize of the Charity World' - joins forces with CFN](#)
- [How community foundations are relevant during a recession](#)
- Latest publication: [Natural Philanthropists: Findings of the Family Business Philanthropy and Social Inquiry](#) (June 2009)
- [Spreading the word about community foundations](#)
- [Supporting professional advisers](#)

Click on the headlines to read more.

Tell us what you think - Manifesto for Community Philanthropists

Professional advisers are invited to comment on Community Foundation Network's first ever Manifesto for Community Philanthropists, an innovative package of measures to promote grassroots giving. Your feedback is highly valued as many of the recommendations involve the legal, banking and accounting professions.

The long term aim of the manifesto is to create a positive culture of giving across the UK, which assumes philanthropy as the rule rather than the exception. The recommendations set out to achieve this aim by enabling an infrastructure which supports effective giving in the UK.

[Read the manifesto](#)

Among the manifesto's 29 recommendations are calls for:

- The use by the Government of its majority shareholding in many banks to bring about the creation of bank gifting accounts to simplify giving and ensure tax efficiency.
- The establishment of a system of lifetime legacies,

There's still time to treble your clients' donations

Community foundations are able to offer £1 for £1 match funding from Government to individuals and companies contributing to endowed funds at community foundations in England until 31 March 2011. For a higher rate tax payer claiming Gift Aid, this could more than treble the size of their donation.

The aim of this ground-breaking initiative by the Office of the Third Sector is to promote and incentivise

to enable philanthropists to release funds earlier from their estates and enjoy and engage with their giving during their lifetimes.

- The creation of special giving zones with favourable tax treatment for donors, modelled on social exclusion zones, and designed to prioritise investments in services in areas of greatest need.
- The setting up of a £30 million 'Philanthropy Infrastructure Investment Fund' to provide seed capital to support IT projects to release more giving.

The manifesto is the result of nine months of careful research by a working group of donors, grant makers and academics led by CFN Chair and community philanthropist, Matthew Bowcock, and overseen by Baroness Prashar, CFN's Honorary President.

Matthew Bowcock said:

"Our recommendations include major reforms to the banking, taxation and the education systems to both release more funds today and promote a culture of giving in the future. This is the most comprehensive package of measures ever published from the viewpoint of the community philanthropists and I strongly urge all the political parties to take a long, hard look at our recommendations ahead of the general election."

All comments should be sent to Community Foundation Network, Arena House, 66-68 Pentonville Road, London, N1 9HS or email to office@communityfoundations.org.uk, no later than 31 July 2009

How community foundations are relevant during a recession

Community foundations are relevant now more than ever because of their support to front-line charities who are responding to the urgent needs playing out in our communities as a result of the recession, and because they offer clients an affordable option for philanthropy.

In terms of our communities, a recent report on the effect of the economic downturn in Milton Keynes involving the community foundation cites the Citizens Advice Bureau there as "sinking" under the weight of requests as people turn to it for help on debt, employment and housing issues. The picture is repeated across the country, with real concerns that the effect on the recession on poorer communities will only be felt slowly, but will be long lasting. For the past nine months to a year, community foundations have been working with philanthropists, businesses, and local and regional agencies to ensure funding goes to where it is most needed and can be effectively deployed, and are estimated to give out more than £70 million this year.

In terms of donors and philanthropists, the recession is

charitable giving to provide funding for small local groups now and in the future.

Find out more about the [Grassroots Endowment Challenge](#) and how this can enhance your clients' giving.

Spreading the word about community foundations

If you know of other professional advisers who may be interested in learning about community foundations, they can [sign up](#) for this Professional Adviser Ebulletin, which will be produced quarterly.

Supporting professional advisers

Community foundations offer many services to support professional advisers and their relationships with clients, in an effort to increase philanthropy across the UK. The more informed the professional advisers are, the more they can assist their clients in finding the right fit when it comes to philanthropy.

CFN and its members can offer a range of services including

- * face-to-face meetings with you and your clients to discuss community foundations and how they can help meet your clients' charitable goals;
- * staff presentations about community foundations and how

triggering some people to re-think how they structure their giving. A recent survey from the US shows how clients are setting up donor advised funds as an affordable option to establishing a charitable trust. Tim Thornton-Jones, Partner with Lawrence Graham, advises his clients that a charitable trust needs to be endowed with at least £750,000 in order to generate sufficient income to be viable.

[Learn more about how donor advised funds compare with charitable trusts](#)

There are over 1,400 donor advised funds in the UK and this number is set to grow with the Grassroots Endowment Challenge. Donor advised funds are simple, flexible and hassle free and include the community foundations expert knowledge of the local community as well as effective grantmaking experience to assist the client.

Related articles

Donor advised funds are key to serving communities in downturn (Philanthropy UK, April 2009)

Donor advised funds will maintain or increase grant making in 2009 to support frontline needs, especially human services, in local communities.

[Read more ...](#)

Family charities shift assets to donor funds (WSJ April 2009)

Frustrated by the upkeep, philanthropists are increasingly unwinding their private foundations into donor advised funds.

[Read more ...](#)

The Beacon Prize, 'the Nobel Prize of the Charity World,' joins forces with CFN

In an exciting new development the Beacon Fellowship Charitable Trust joined forces with Community Foundation Network on 1 April 2009 to extend the influence and reach of the Beacon prize scheme and Fellowship programme across the UK.

Beacon was set up in 2002 to encourage individual contributions to charitable and social causes and to celebrate and showcase best practice in giving. Over the years it has highlighted some of the UK's most inspirational winners, showcasing innovation and best practice in philanthropy: these include Sir Tom Hunter, Sir Bob Geldof, Dr Helen Bamber, Jamie Oliver and Paul and Diana Lamplugh.

Professional advisers will have an opportunity to nominate philanthropists, social entrepreneurs and charity leaders to over eight award categories including ones for family philanthropy, youth philanthropy, innovation, leadership and community building. The next round of awards will be in

funds work;
* strategies for giving.

[Find out more about our services](#)

Or contact [Clare Brooks](#), Director of Philanthropy at CFN or phone her on +44 (0)20 7713 9326.

October 2010 with details on nominations and how to get involved announced this October.

We'll be keeping you informed but you can also go to www.beaconfellowship.org.uk

Latest publications: Natural Philanthropists: Findings of the Family Business Philanthropy and Social Responsibility Inquiry

The Institute of Family Business launched a new research commissioned in collaboration with Community Foundation Network which aims to throw light on how the family business sector is acting in terms of social responsibility and philanthropy.

[Read the report ...](#)

The report identifies six distinctive features of family businesses that shape and encourage their socially responsible activities:

1. Family business model. The high overlap between the stakeholders - the family, the employees and the community - enables socially responsible behaviour to be effective.
2. Passion. Family businesses don't always need a business case for philanthropy; it's the family name above the door and their reputation that gives the motivation.
3. Localised nature. Most family businesses recognise that their success is enabled by the support of the community in which they are located, creating a desire to give back.
4. Stewardship model. Family businesses are built to be passed on to the next generation; beyond the necessity of making short term profits they are building an enduring legacy.
5. Pursuit of non-monetary goals. Social, environmental and sustainability considerations are given credence alongside financial performance.
6. Inter-generational transfer of values. Philanthropy can be used to transfer family values to the next generation.

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