



# COMMUNITY FOUNDATION IN WALES

## I Who are we?

**The Community Foundation in Wales advises, supports, promotes and manages philanthropy in Wales.**

We support individuals, families and businesses, as well as other trusts and foundations, to manage their charitable giving effectively and efficiently. We are a cause-neutral, independent, nationwide charity providing a tailored service for private clients who want to give back to Wales.

Along with our donors, clients and partners, we are not only passionate about Wales but we're passionate about giving

back to Wales – supporting and helping Welsh communities and causes. However, our beautiful and much visited country, which has so much to offer, still faces many challenges. These challenges exist across the length and breadth of Wales in education, culture, communities, health and the environment. Wales is a low income nation with the highest proportion of adults and children living below the poverty line in the UK.

We work with our clients and our communities to address these challenges, linking donors with do-ers to achieve their philanthropic ambitions.

## I What do we do?

Our tailored, bespoke philanthropy service allows us to advise and support clients should they wish to give to charitable causes in Wales. We do this in two ways:

### **1. Immediate impact fund**

The donation is spent straight away, normally within one year, and can be topped-up annually thereafter.

### **2. Endowment fund**

We invest money on the client's behalf, establishing a long-term capital base and using the income as a continuous flow of charitable giving which can also be added to at any point thereafter.

## I Why choose us?

When an individual, family or business choose to give charitably they have a few options – give to recognised established charities, set up their own charity or foundation or channel their charitable giving through a Community Foundation.

Giving to a registered charity is simple, however, setting up a charity or foundation from scratch is not. Every charity must register with the Charity Commission and appoint a Board of Trustees. This may take several months to set up and the donor/trustees must maintain all



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financial records, prepare accounts and submit formal reports annually. In addition to this the donor/trustees must control all aspects of grant making and be responsible for developing their own monitoring and evaluation protocols.

We at the Community Foundation in Wales are able to offer an alternative, cost effective solution to those who are interested in local charitable giving, as well as the knowledge to connect clients to a wide range of charitable activity. The Foundation's professional team promotes the Fund, identifies and assesses grants, provides input on community needs and undertakes due diligence on all applicants. After awarding any grant the Foundation will complete monitoring and evaluation, producing an annual impact report for the client.

## How do we work?

Setting up a named fund with the Community Foundation in Wales is flexible, bespoke and an alternative to setting up a charitable trust. It can be set up in an hour and the donor can be as involved in the fund as they wish. Grants can be awarded in the client's name or anonymously and can be targeted to charitable groups and activities by cause/issue or geographical area, or both. Our grants department have a wealth of knowledge of charitable activity across Wales and can advise and direct charitable giving as advised by the client and can achieve a greater impact through leverage with other Funds.

## Where?

We're based in Cardiff but travel all across Wales to meet our client's and our causes' needs. To discuss any of the above or to find out more information please contact:

**Mari-Wyn Elias-Jones** (Development Manager) on [mari-wyn@cfiw.org.uk](mailto:mari-wyn@cfiw.org.uk) or **02920 379580 / 07880 382600**.

Feel free to visit our offices at **St Andrews House, 24 St Andrews Crescent, Cardiff, CF10 3DD**.

## The Charity Commission's website states:

*"If you want to help your local community but don't have lots of spare time to run a charity, you could consider setting up a fund with a Community Foundation instead."*

Furthermore, the Community Foundation in Wales is a perfect vehicle for charitable giving if you want to give back to Wales, whether a specific cause or geographical area (or both!). We have extensive knowledge of the charity landscape in Wales and work with clients to achieve their philanthropic ambitions. We're passionate about Wales, passionate about philanthropy and dedicated to providing the best possible care for our clients.