



Oxfordshire
Community Foundation
Local people helping local people

PHILANTHROPY SERVICES

FOR YOU AND YOUR CLIENTS



**ADD PHILANTHROPY
SERVICES TO
YOUR TEAM**



The best advice is given to clients by the best professional teams. A community foundation's specialist knowledge of the charitable sector in their local area can make them a key member of the best team a client can have.

Oxfordshire Community Foundation (OCF) can enhance your service to clients. We can

share ideas and examples of philanthropy that showcase a more proactive approach to charitable giving – helping your clients consider how and when they might best give their money.

Hear more from some clients who are happy to tell our story...

THE BIG HEART

“

Working with OCF is the simple way to give to the themes I care about the most. I would never have known about many of the causes I've helped without them.”

Jane Mactaggart has charitable giving in her blood. Her father was a successful property builder in Glasgow, and encouraged all of his children to be community minded. Now she works with us to give to a selection of local charities.



HOW WE HELP YOU WITH CLIENTS LIKE JANE

- An alternative to a private foundation, without the responsibilities of governance
- Access to the local organisations addressing the issues they are most concerned about
- A solution for individuals wishing to give confidentially

THE CAMPAIGNER

“

OCF saved me the cost of setting up my own registered charity. They give us that personal service, which means we trust them – but we also get a lot of moral support for what we are doing.”

When **Nikki Rouse Thompson**'s husband Paul died suddenly of a cardiac arrest, she set up a charitable fund in his memory that buys community defibrillators.



HOW WE HELP YOU WITH CLIENTS LIKE NIKKI

- A hassle-free and cost-effective alternative for anyone considering setting up a new charity
- All the administration and good governance taken care of
- Full client control over how the funds they've raised are used

Law firm **Withy King** wanted to take a more strategic approach to its community engagement. They are working with OCF to create opportunities for their staff to support the local charitable sector.



THE COMPASSIONATE CORPORATE

“

Working in partnership with OCF gives us the confidence we need as a local business to know our contributions are making a real, long-term difference.

”

HOW WE HELP YOU WITH CORPORATES LIKE WITHY KING

- The chance to proactively plan their giving within their long-term financial budget
- A truly meaningful CSR programme that resonates with the business's activity
- Public recognition or complete discretion, depending on the wishes of the business

THE STRATEGISTS



“

The match funding we accessed through OCF was quite compelling. We feel satisfied knowing that our contribution to their endowment will be used to provide support well into the future.”

David Harding is CEO and founder of Winton, a global investment management company. He and his wife Claudia worked with OCF to add a local element to their extensive portfolio of charitable giving.

HOW WE HELP YOU WITH CLIENTS LIKE DAVID AND CLAUDIA

- Innovative match-funding schemes that boost the value of their initial gift
- Impact in perpetuity via our permanent endowment model
- National coverage through a network of 48 similar foundations UK-wide



THE FAMILY TRUST

“

Through OCF, our daughter's fund makes grants that help children discover literature. In this way, Maggie herself has inspired others and shared the things that she loved – such a fitting way to remember her.”

Bob and Kati Evans set up a memorial fund for their daughter Maggie after she died tragically aged 29. When it could no longer be hosted by Bob's Oxford college, they transferred the funds to OCF.

HOW WE HELP YOU WITH TRUSTS

- Regeneration for dormant or moribund trusts, taking over administration and finding new projects
- A home for the funds within an established infrastructure endorsed by the Charity Commission
- Good accountability for trustees, and assistance with long-term succession planning

Jane Wates has always been very socially minded. She volunteers with a great variety of different charitable organisations, and was awarded an OBE for her service to the local community.

THE LEGACY

“

I've chosen to leave a gift to OCF in my will because their endowment model makes me confident that it will live on well into the future. I don't know if the charities I support now will exist or be relevant – OCF will always be a living charity.

”



HOW WE HELP YOU WITH CLIENTS LIKE JANE

- An alternative for clients hesitant to commit to specific charities in their will
- A guaranteed impact, regardless of changes to the social or charitable landscape
- Assistance for an executor or solicitor to distribute a legacy in accordance with a client's wishes

THE TRUSTED ADVISOR

Steve Marker is Director and Chartered Financial Planner at Hansford Bell. He takes a collaborative approach, helping clients throughout the South West with effective lifestyle-based financial planning.



“

The service that community foundations offer is the perfect complement to my firm's own services. It's made such a difference to have a philanthropy expert on the team – and OCF make the whole process hassle-free and human for clients.”

HOW WE HELP YOU

- Direct contact with you if you are acting on behalf of a client
- Introductions to others we've helped, sharing learning and ideas
- Integration of philanthropy services into your own client offering

NOTES



COULD WE BE PART OF YOUR TEAM?

We are one of 48 community foundations across the UK, and over 1,700 similar foundations around the world. We work with donors and their advisors to provide a permanent, flexible and growing source of local charitable funding that will directly address the needs of Oxfordshire's most vulnerable.



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