

# What is Sussex Community Foundation?

Sussex Community Foundation is an independent charity that develops and supports local charitable giving. We are part of a national network of UK community foundations that distributes £65 million a year to charities and community groups.

We raise money for and make grants to local charities and community groups across East and West Sussex and Brighton and Hove. We manage charitable funds on behalf of Sussex donors and oversee the grant-making from those funds.

Unlike a national charity, we have a unique Sussex-wide understanding of the county's smaller charities and community groups. We make it easy for people to give money to local causes close to their hearts and ensure their donations reach the Sussex people that need them.

Since 2006, we have given grants totalling over £9 million to 1,500 charities and community groups. Most of the grants we give are between £1,000 and £5,000 and make a big difference to the groups that receive them. Many of these are smaller organisations that do not have the profile or fundraising resources of larger charities.

We have built a permanent endowment fund, currently standing at over £11 million. It will provide Sussex communities with sustainable funding into the future.

## Why choose Sussex Community Foundation?

Sussex Community Foundation is the ideal vehicle for people who want to put something back into the communities in which they have lived and worked. By channelling funds directly into grassroots community projects, Sussex Community Foundation aims to improve the quality of life for people across Sussex with a special focus on helping those who are disadvantaged in some way.

## Named Fund

The main service we provide for our donors is our named fund. This is a charitable fund, set up and tailored to the donor's interests in both geography and charitable themes. We currently manage over 70 named funds on behalf of individuals, families, companies and charitable trusts. A named fund is a great way for a donor to get directly involved in community philanthropy, without the cost and administration of setting up a separate charitable trust. Sussex Community Foundation handles all administration and applications from community groups for support.

Named funds can either be distributed over a set period in a flow-through fund or invested in an endowment fund to establish a long-term resource for the Sussex community. We can advise on the best approach for a named fund to reflect the donor's wishes and needs of the community. Depending on the size of gift and how involved the donor wishes to be in making decisions about individual grants we can advise on the best approach for a named fund.



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**For further information, please contact Lauren Lloyd or Stephen Chamberlain on 01273 409440**

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# Benefits of giving through Sussex Community Foundation

## Flexibility

Through our named funds, we provide a tailor-made service that reflects the wishes of each donor. This bespoke service covers all aspects of the fund's operation, from targeting areas of special interest to the extent to which a donor may wish to be involved in the grant-making process. Through Sussex Community Foundation, gifts may be made to any charitable project that benefits the local Sussex community. These do not necessarily have to be registered charities as Sussex Community Foundation is able to fund non-registered community and voluntary groups.

## Convenience

Named funds can be set up quickly and easily. Much of the work involved in registering a new charitable trust and the consequent time and expense can be avoided, as Sussex Community Foundation already has the people and the framework in place to carry out this work. A simple written agreement is drawn up, which can be amended later, if required. Sussex Community Foundation undertakes all the day-to-day work involved in administering the grant-making programme. This includes handling enquiries from prospective grant applicants to making decisions, as well as fulfilling all the accounting and reporting requirements.

## Meeting needs

Many people see Sussex as a well-off county but there are significant areas of deprivation, particularly in some coastal areas and less obvious areas of disadvantage in more rural, isolated areas, hidden from view. A great deal of vital work is done by smaller, less well-known charities and community groups but it can be difficult to know which of these groups need support. Sussex Community Foundation's local knowledge can help to identify suitable recipients and therefore reach those who might not otherwise find the funds they need. We can guarantee that money donated to us will only be spent locally and in support of any charitable, educational or benevolent purpose.

## Expertise

Sussex Community Foundation is governed by a board of trustees from a variety of backgrounds with a wide range of skills and experience. The professional staff team is led by Chief Executive Kevin Richmond who has been with the Foundation for ten years and has extensive experience in managing charities. The team has a wide knowledge of the local community and its needs. It has established comprehensive grant-making policies and procedures, ensuring each application is dealt with efficiently and assessed carefully. Sussex Community Foundation also has access to professional advice, for example, in managing its growing investments.

## Permanence

Sussex Community Foundation is here to stay. By building a substantial, endowment fund for the community, Sussex Community Foundation is not only helping to tackle today's needs, but also developing the means to address the needs of future generations. Anyone who is considering establishing a fund or leaving a legacy to the local community can be assured that Sussex Community Foundation will honour their charitable wishes.



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# Working with charities and trusts

Sussex Community Foundation provides an effective means for other charities and trusts to meet their aims by working with us.

Some charitable trusts have established a named fund at Sussex Community Foundation to reduce the time and cost of administration and to help them reach areas and address needs they might not otherwise have been able to. The Foundation is able to manage all, or specific aspects, of a trust's giving. For example, a named fund may be set up to support smaller local community groups in Sussex, while the trust continues to support larger and/or national charities directly (see also information sheet *Setting up a Named Fund*).

## Winding up a charity and/or transferring assets

In other cases, we have helped charitable trusts that have decided to wind up their affairs because they are no longer able to pursue their charitable objectives, their income was not sufficient to continue grant making or support administration, or their trustees were considering retirement.

Reductions in grant funding and increased competition for contracts mean that some service delivery charities are also struggling to find a way forward. For some, this may mean that the trustees have to take the difficult decision to wind up the charity. If there are any assets in the form of cash, investments or property, the trustees then have to decide what to do with them. Charity Commission rules are clear that residual assets must be passed on to another charitable organisation fulfilling similar objects.

In the same way, for those setting up a Community Interest Company (CIC), the 'asset lock' requirement means that, in the 'articles of association', you have to name a relevant community organisation to whom assets would go in the event of closure.

## Setting up a named endowment fund

One option to consider in these circumstances may be using the residual assets to set up a named endowment fund at Sussex Community Foundation (see information sheet *Setting up a named fund*). As a local grant-making charity with broad objects, we are able to set up funds to meet any charitable purpose.

For a minimum of £50,000, Sussex Community Foundation can establish an invested fund in the name of the original charity or CIC. The grant-making criteria of the fund can support the original aims, so perpetuating the work of the organisation by distributing income from the resulting fund as grants to relevant local projects.

The original trustees or directors may form a panel to make decisions about individual grants, so maintaining their involvement in the work.



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# Working with charities and trusts



## Westdene Fund



Dr Bernard Eastwell OBE is a local physicist and businessman who built a very successful international company supplying scientific instruments.

He learnt to play the piano at an early age but, despite a continuing interest in many kinds of music, the demands of family life and a growing business inhibited developing his own musical talent.

A man of wide interests such as sailing, flying and gliding, he resumed playing the piano in retirement. Concerned over the lack of public funding for young musicians who showed talent and potential for a career in music, Bernard created the Westdene Trust in 1994 to offer financial assistance to talented young people aged 16-20.

A number of these instrumentalists have successful careers and hold significant positions in well-known orchestras. Other more recent candidates are achieving significant success at music college.

As a result of the increasing age of the trustees, it was agreed in 2011 that the assets should be entrusted to Sussex Community Foundation which would establish and administer the Westdene Fund to run with similar aims and criteria as its predecessor.

## Noel Bennett



Noel Bennett was one of the great characters of Sussex cricket, the founder member of Noel Bennett's XI Cricket Club. During World War Two, Noel started an annual game of cricket on his birthday, 25th December. Soon the game was being regularly reported by national and international media. Noel played cricket on Christmas Day into his eighties.

When Noel died in 1994, he left bequests to sporting associations, and the balance of his estate for 'charitable purposes with particular emphasis on the young and the old'. The Noel Bennett Charitable Trust was set up in 1995 and has been awarding annual grants ever since.

In 2008, when the trustees were approaching retirement, they decided to use his legacy to set up the Noel Bennett Fund at Sussex Community Foundation. They have formed a panel to award grants and, in this way, Noel's legacy continues to benefit Sussex.

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# Setting up a named fund

One of the main options that we offer donors is a named fund. This is a ring-fenced sum of money held by Sussex Community Foundation and used to make grants to charities and community groups in Sussex.

Setting up a named fund is a great way for a donor to get directly involved in community philanthropy, without the cost and administration of setting up a separate charitable trust. We provide personal support to ensure that giving is effective and we help to match the donor's charitable interests with local needs.

Sussex Community Foundation handles all administration and correspondence related to the named fund. Donors can make decisions on what kind of causes they wish to support and where the funds should be directed. The Foundation operates an open and accountable application process, publicising the availability of funds and, where appropriate, inviting relevant local charities to apply for funding. All applications undergo a rigorous and transparent assessment process to ensure there is good governance, financial and project management and to assess the positive impact on the community.

The named fund provides a mechanism through which it is rewarding and effective for donors to award grants to meet local needs.

## Types of named funds

Options for named funds vary, depending on the size of gift and how involved the donor wants to be in making decisions about individual grants. We can advise on the best approach for a named fund. Once the fund is active, we will match it with appropriate requests for support from local charities and community groups. There is also the option of joining with like-minded others in supporting a local fund for a specific geographic area or a themed fund, benefitting a particular issue or cause.

Named funds can either be distributed over a defined period of time in a flow-through fund or invested in an endowment fund, where the capital remains and the income from the investment is used each year to distribute as grants.

Typically, the minimum donation to establish a flow-through fund is £10,000 per annum. For an endowment fund, the initial donation starts from £25,000. However, these amounts are negotiable.

The advantage of an endowment fund is that it remains as a permanent resource year after year. Over a relatively short period, the value of grants awarded becomes greater than the original donation which itself remains as a capital fund. The donor may wish to set up a combined fund, with some funds distributed immediately and the remainder added to endowment.



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Sail Boat Project  
Funded by the Field Family Fund

The Field Family has lived in Sussex for many years and been significant contributors to the community life of the county.

Since 1995, Colin and Christine Field have been directors of their family business, the CPJ Field Funeral Company, which has funeral homes across Sussex.

Colin and Christine Field decided to set up a named fund at Sussex Community Foundation partly because of the emphasis on supporting small local groups and also because of the option of establishing an endowment fund. Funds are invested and income used to award grants.

"We were keen to set up a permanent fund that would provide support for the local community for many generations to come. That's why the endowment fund option at Sussex Community Foundation was so attractive." **Christine Field**

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# Setting up a named fund

## Management and decision-making

The majority of Sussex Community Foundation's investments are managed by Sarasin & Partners LLP which manages over £7 billion on behalf of its clients. It has a strong investment track record and specialises in services for charities.

A formal fund agreement between the Foundation and the donor is drawn up to govern practical areas such as responsibilities of those involved, the grant-making process, causes and issues supported and the decision-making process.

The donor can delegate responsibility for decisions on grant-making to Sussex Community Foundation or become more involved themselves. A grant-making advisory panel can be convened by the donor, if required. Some companies choose to involve their employees in making decisions on individual grants.

If the fund is established as part of a legacy, the donor can appoint family members or friends to be involved in making decisions on grants, if they choose, or ask Sussex Community Foundation's Trustees to make these decisions on their behalf.

Sussex Community Foundation's Board of Trustees has ultimate responsibility to ensure that all income is distributed for charitable purposes under the agreed criteria.

## Feedback and contribution to the Foundation

A report is provided every year on the value of a fund, investment performance, and grants awarded, including feedback from grant recipients on the impact the donor's giving has made. Fund-holders can choose to receive regular newsletters, our annual review and to attend our AGM and other local events.

Sussex Community Foundation asks for a contribution towards its general charitable purposes for services provided in managing named funds. Typically for endowment funds, this is 3% of the initial donation, as a one-off set-up charge and 1.5 % of endowment capital per year. For flow-through funds, the charge is 10% of the total donation.

This includes management of the fund, investment charges, if applicable, and administration of the grant-making process, monitoring of grants and reporting to Charity Commission.



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Mick's Garage  
Funded by the Cullum Family Fund

Peter Cullum is an entrepreneur in the UK insurance sector and has built up the largest independently-owned insurance group in Europe.

In 2006, he established the Cullum Family Trust to provide funding for a small portfolio of charitable causes. The Trust is managed by his two daughters, Claire Cullum Jay and Abi Cullum, both residents of Hove. The family has allocated some of their charitable giving to local causes and has set up the Cullum Family Fund at Sussex Community Foundation.

"We wanted to make a difference to our local community and the Foundation offered us an ideal way to do this. The team has a great deal of knowledge about the local community and is already running a grants programme which we can just tap into."

**Claire Cullum Jay**

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# Legacies – leaving a lasting gift for the community.

## Why Sussex Community Foundation?

Many of our supporters have been committed to Sussex for many years and don't want that commitment to end when they pass away. Although some people have a clear idea which charities they wish to support through their will, others may want to give back to their local community but are unsure exactly which charities to support. There may be a concern as to whether a smaller local charity will still be operating in the longer term.

Some may have considered giving a larger sum and so looked into setting up a charitable trust. They may have found that, for the amount they are planning to give, this option is relatively complicated and expensive.

Sussex Community Foundation provides a uniquely flexible range of options for people interested in leaving a permanent legacy for their local community. Donations are typically invested through our endowment fund and the income distributed each year as grants, meaning that the gift provides long-lasting benefit for generations to come.

The bequest can be left as an unrestricted gift to Sussex Community Foundation, enabling our trustees to direct funds towards the best local groups supporting the most immediate local needs. Alternatively, it can be directed towards specific local organisations, added to an existing fund at the Foundation, or used to establish a named fund. We can accept gifts of shares, property or investments, as well as cash donations.

## Ways to give a legacy to Sussex Community Foundation

In summary, the options for leaving a legacy through us include:

### Supporting Sussex Community Foundation

Simply naming Sussex Community Foundation as the beneficiary in a will means that we have the flexibility to support a wide variety of important local causes and respond to changing needs over time. Sussex Community Foundation will use the donation in the best and most effective way to improve lives in the local community.

### Supporting an existing fund

Gifts of any size can be added to one of the funds already set up at Sussex Community Foundation, for example, benefiting a specific geographic area of Sussex or a particular social issue. The gift is invested alongside other donations, multiplying the overall benefit.

There are details of existing funds at [www.sussexingiving.org.uk/named-funds](http://www.sussexingiving.org.uk/named-funds)



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# Legacies

## Supporting existing charities

If a donor wishes to support a number of local charities, a gift can be left to Sussex Community Foundation with instructions to distribute the donation between them, perhaps over a period of years. If any of the charities closes down in the meantime, we will ensure that the gift is redirected to another organisation with similar aims.

## Creating a named fund.

Larger bequests can be used to establish a unique named fund at Sussex Community Foundation. Please see information sheet *Setting up a named fund* for full details. For example, with a gift of £50,000 or more, a named endowment fund can be set up that is invested and the income used to support the kind of causes/charities specified by the client.

### The Arthur & Doreen Green Fund

Arthur Green has lived in Hove for a number of years and is now well into his retirement. In 2008, Arthur's wife, Doreen, died from cancer. Arthur is keen to leave a legacy that will provide long-term benefit for local charities and organisations, particularly those helping young people, old people and hospices.

After contacting Sussex Community Foundation and discussing the options available, Arthur decided that with the legacy he had inherited from his wife, he would set up the Arthur and Doreen Green Fund. As his donation attracted Gift Aid, the Fund also benefitted from the resulting tax claim. The Fund will increase again under the legacy Arthur has included in his Will.

"Doreen loved children but sadly we were not blessed with having children of our own. As the sole surviving member of my family, the family line would have ended eventually but, with the help of Sussex Community Foundation, that will now not happen. The Foundation has set up a fund in my name and that of my late wife. Not only will the fund be a permanent memorial to us both but, more importantly, the income generated by the fund will provide a contribution to the financial needs of some of the many worthy and deserving causes that exist throughout East and West Sussex."

### Robert and Geraldine Bromley

Robert and Geraldine Bromley plan to leave a legacy to Sussex Community Foundation in their wills to benefit the market town of Rye and its surrounding villages. "We can name a number of couples who share our 'love at first sight' experience of our town. Across Sussex, there are thousands similarly dedicated to the town or village in which they reside," says Robert.

He and Geraldine have a shared interest in the built environment of Rye, its buildings, pavements and cobbled streets. "We will specify that the bequest we eventually leave will be to benefit those aspects of the town. We urge others who value their community's future to give serious thought to doing the same."



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Arthur & Doreen Green



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# Legacies

## Suggested wording for legacies

This is some suggested wording to use when a client would like to give a legacy to Sussex Community Foundation. Please contact us if you have a query or would like to talk through any particular client requirements.

### Residuary legacy

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, all *[or the size of the Foundation’s share e.g. half]* the residue of my estate absolutely and I direct that:

(i) the assets comprising such residue may be used for the general purposes of Sussex Community Foundation, and

(ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”

### Pecuniary or specific legacy

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the sum of £..... *[or name of item/property for specific legacy]* and direct that it *\*(be paid into a designated fund to be called ..... and):*

(i) may be used for the general purposes of Sussex Community Foundation and

(ii) a receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”

### Leaving a legacy to set up a named fund

If your legacy has a value greater than £25,000, you may wish to establish a named endowment fund at Sussex Community Foundation. You may then specifically direct the causes to be supported and all future grants will be given in the name you choose. In such cases, we would suggest the following wording:

“I give to Sussex Community Foundation, registered charity number 1113226 absolutely, the *[...sum or name of property]* to be applied by the Foundation for its general charitable purposes and I direct that it be paid into a designated fund to be called *[.....]* and used for the purposes outlined in my last written communication to the Foundation subject to the articles of association and constitution of Sussex Community Foundation including the power of the Board of Trustees to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to specified organisations, if in its sole judgement such restriction or condition becomes in effect unnecessary, incapable of fulfilment or inconsistent with the charitable needs of the area served by the Sussex Community Foundation.

A receipt signed by a person for the time being authorised by the Trustees of Sussex Community Foundation shall be a good and sufficient discharge to my executors.”



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