

# Give your way

A guide to generosity,  
impact and legacy



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“I’ve loved supporting Peace of Mind. They’re an excellently led organisation, doing seriously important work. Not only did the Community Foundation bring them to my attention in the first place - for which I’ll be eternally grateful - but they also organised an opportunity to meet them in person and see their work first hand. It was an experience I’ll never forget.”

**Magnus Willis**  
Community Foundation donor

**Cover:**  
Young people from balletLORENT’s Youth Academy

**Left:**  
Peace of Mind summer playscheme in Gateshead.

**Right:**  
Helix Arts ‘Real Voice’ project.

## What inspires you to give?

Developing an in-depth understanding of your interests and goals is where the work of the Community Foundation begins.

- Would you like to address specific issues facing your community?
- Do you want to make a lasting impact?
- Would you like to give with others who share your interests?
- Do you feel a special connection to the people and places of North East England?

If the answer to any of these is **yes**, then a conversation with our team could make all the difference.

The Community Foundation is a charity trusted by hundreds of people and businesses who want to make a lasting difference in North East England. We make giving easy and effective, helping you address causes that matter to you, from poverty to education, the arts to the environment, health to housing, and much more. With our unrivalled knowledge and research, we’re here to guide your giving journey whether you’re an individual, a family, a business, an advisor, or a fellow funder.



The Community Foundation’s Vital Signs North East is one of the most comprehensive research projects of its type in the UK. It provides our donors and fundholders with rich insight into the most pressing issues facing communities across the region.

If you’d like more information, our team can provide guidance on the key themes, which include:

- |               |                    |
|---------------|--------------------|
| • Culture     | • Living standards |
| • Justice     | • Homes            |
| • Environment | • Education        |
| • Health      | • Community        |
| • Economy     | • Access           |

# Why give through the Community Foundation?

We were created with a single purpose: to support communities now and in the future by inspiring and enabling our region's generosity.

The unique strengths of the Community Foundation include:

- Our ability to tailor giving to your wishes while making it easy and rewarding
- Our expert team's experience and insight which help to inform your charitable plans and goals
- Unrivalled connections which can help you support a broad range of local causes
- Exclusive events to help inform your giving
- Extensive experience in supporting individuals, multi-generation families, businesses of varying sizes and industries, and those wishing to give in memory of a loved one
- As the largest Community Foundation in the UK, our stability means we can support giving for many years and even your legacy
- Opportunities to meet charities and community organisations and see the difference you are making
- Robust, user-friendly research which shines a light on issues and ways to make a difference in your area
- A network of generous people, businesses and funding bodies, together with brilliant local charities, all making a difference to the world on our doorstep
- Economies of scale through our shared systems, pooled investments and wide reach across the region and its charitable sector

## Give in Good Company



The Community Foundation Tyne & Wear and Northumberland is the **largest foundation** of its type in the UK



**300+**  
funds under  
Community  
Foundation  
management



Over  
**1,300**  
grants worth millions  
of pounds made  
each year



**£165m**  
in grants made to  
North East community  
organisations since  
the Community  
Foundation was  
founded in 1988



Over  
**150**  
donors support  
the Community  
Foundation in a  
typical year

# How to get started

Giving is a personal journey, and we're here to support and advise you or your business.

To start, think about motivations and goals. Some questions to consider are:

- What causes or communities matter to you most?
- How much are you looking to give?
- Do you want to give now or plan a gift in the future?
- Who else do you want to involve?
- How hands-on do you want to be?
- Do you want to give time as well as, or instead of, money?

When considering major donations, it's a good idea to get professional advice on things like financial, tax and estate planning. We would be delighted to talk things over with any professional advisor you're working with.

# Your giving options

Anyone can be a philanthropist and the Foundation's team of expert advisors is here to make sure that whatever option you choose, your giving is effective and rewarding.



## Give with others

Through the Community Foundation, you can give with others to make a bigger difference. Our collective funds cover issues like young people, women, arts and culture and the environment. Others help a particular part of our area. We also have giving initiatives for younger professionals, for companies of all sizes and for people whose roots are in our region. You can support a current fund or talk to us about new areas where people could come together to give.



## Start your own fund

Starting your own fund is quick and easy. It's like having your own charitable trust or foundation but without the hassle of administration and regulation. We'll work with you to tailor your fund according to your goals and circumstances. You'll get regular feedback on how you've made a difference.



## Leaving a lasting legacy

You can leave a legacy gift in your Will of any size to help your community for generations to come. An unrestricted gift leaves us the flexibility to support changing needs in the future. You can also leave a gift to support a particular cause or area through our collective giving funds. Or, with a gift of £10,000 or more in your Will, you can set up your own named fund.

# Setting up a fund

Many people come to us to start a charitable fund for themselves, their family, their business or a professional client.

You can set up an **invested fund**, where gifts are held as capital earning income each year to help your chosen causes. Or you can have an **annual fund**, with gifts held as cash to help causes each year. Some people choose a combination of invested and annual funds. For both, we have options to suit how involved you want to be.

- **Advised** is our most hands-on and flexible option, offering many of the benefits of a charitable trust but without the administration. We use our expertise to identify and assess charities and community organisations which match your interests. You choose those you most want to help. You can also nominate charities for support.

- **Field of interest** is a more streamlined option. You decide on your causes, but instead of having to be hands-on, we use our expertise to direct support to charities and community organisations making the most difference in that field.
- **Designated** allows you to name one or more charities to benefit long term – we support them every year after checking they're still working effectively.
- **Unrestricted** means giving us the freedom through your generosity to target resources and start projects that meet changing needs now and in the future.



**Left:**  
Attendees at the Women's Fund Event.  
**Right:**  
Dance training at balletLORENT

## How do we steward your gift or fund?

The Community Foundation's board of trustees has overall responsibility for our finances and investments. The trustees are all experts with leadership experience in the business, charity and public sectors. Our Investment Committee oversees our funds, ensuring they are managed carefully, while maximising value and income over the long term. We use UK-regulated professional investment managers who report regularly against the financial and responsible investment goals we've set.

## Contact the team

To discuss how you can achieve your giving goals, contact  
Lisa Cappleman on 0191 222 0945  
or [lc@communityfoundation.org.uk](mailto:lc@communityfoundation.org.uk)



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It is great to have been able to support balletLORENT, and other groups, in their work bringing out the best in young people. It has been a great privilege to be able to donate via the Community Foundation, who have helped me so much in my aims to help people, especially those who face barriers, realise their potential in all sorts of ways. They are a tremendously dedicated team who have taught me so much and been a pleasure to work with. I am so glad to have found them.”

**Prof. Nicola Curtin FMed Sci**  
**Community Foundation donor**

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**Photography:** Gilbert Johnston Photography, balletLORENT, Helix Arts

Registered Charity No. 700510

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