

# Donor advised funds

**Setting up a donor advised fund with us provides a practical, valuable and easier alternative to setting up your own charity or charitable trust. You also benefit from access to OCF's resources and local relationship support.**

Whatever the reason, a donor advised fund is often the most effective way of carrying out great charitable intentions. They can be created to campaign for a cause local to you, as a way of demonstrating impactful CSR, or simply because you can and want to make a difference in Oxfordshire.

You can be as involved as you want to be in how the fund is used or you can leave it to us to decide. Our experience of managing funds, together with our research insights have given us an in-depth understanding of the most urgent social problems, the priority issues and their locations within Oxfordshire.

By giving through OCF in any way, your charitable gift is worth significantly more than it would have been via a conventional donation.

## Benefits of a donor advised fund

- **Authenticity:** fundholders enjoy the peace of mind of knowing that the fund is part of OCF's governance.
- **Efficiency:** OCF is responsible on behalf of the fund for all the administration, annual reporting and communication with the Charity Commission and HMRC.
- **Growth:** the monetary value of donations is maximised thanks to OCF's eligibility to reclaim Gift Aid, access to match-funding schemes and professional investment management, alongside the pooled wealth of all our donors.
- **Impact:** charitable gifts have a wider and deeper impact in the community, as fundholders benefit from OCF's local knowledge, insight and understanding of the local charitable sector, partners and other stakeholders. We also have a 25-year track record of running a charity.
- **Perpetuity:** charitable gifts will continue to benefit the community, as OCF will honour a fundholder's charitable wishes even after they passed away, or after the initial momentum to set up the fund has slowed.

## How it works



## SOME OF OUR FUNDS

### Maggie Evans Fund

Maggie's family created this fund in her memory. The fund is used to help children discover a love of stories, languages and reading – which were Maggie's own passions.



### Meech Centenary Trust

Manufacturing experts Meech have set up a fund to help young people to find work or get back into education in and around West Oxfordshire.



### Our Common Good

Promoting and piloting place-based giving and collaborative philanthropy in Oxfordshire, Our Common Good aims to develop the capability to replicate such approaches nationally and with other UK Community Foundations.



### Step Change Fund

Focused on improving social outcomes by funding transformational change in voluntary sector organisations, enabling them to achieve sustainable increases in service delivery and to strengthen financial viability.

