



Setting Up a Fund

How to
make the
most from
your giving

The 
Community
Foundation
Northern Ireland



Welcome

At the Community Foundation for Northern Ireland, we know philanthropy. With over 45 years of experience, we are here to help you make a lasting impact in Northern Ireland, a region with unique social and economic challenges.

We understand that navigating this space can feel overwhelming. Deciding how to make a meaningful difference requires insight, strategy, and the right support. That’s where we come in.



RÓISÍN WOOD
Chief Executive Officer

Whether you’re establishing your own fund or contributing to one of the Community Foundation for Northern Ireland’s existing or thematic funds, our expertise ensures your efforts create tangible, positive change in local communities.

By working with us, your gift can strengthen community organisations, support innovative solutions to pressing social issues, and uplift Northern Ireland’s most vulnerable.

Together, we can unlock potential, build resilience, and inspire growth across the region.

Róisín Wood

About Us

The Community Foundation is a flexible and agile funder who listen and respond to the changing needs of our communities.

Setting up a fund through the Community Foundation is quick and easy for anyone wishing to support local communities and causes.

Whatever the reasons or motivations for giving, we will ensure that all funds are future proof, and suit the fund-holders wishes and circumstances.

Working closely with funders and donors, our connections across these islands ensure that vital funding reaches those most in need as quickly and impactfully possible.

Our Impact

The Community Foundation for Northern Ireland has awarded £120m over 45 years to groups and organisations across Northern Ireland.

Over the last five years more than £52 million has been awarded to over 4,000 projects.

With your help we can continue to make an impact in areas including education, health, housing, the arts, social justice, employment, peace and reconciliation, climate and equality, inclusion and diversity.

Together we can continue to empower local communities to affect positive change.

Our Expertise

- Expert team to help shape your vision
- Donor care and guidance package
- Provide informed strategic giving solutions
- Build a long lasting trusted relationship
- Harness an extensive network of contacts





Getting Started

With 45 years of experience the Community Foundation team are here to guide you on your journey. Our team will directly assist and advise you on the best options to maximise the impact of your giving.

What We Provide

- **Tailored and Flexible Support** with personalised solutions for hands-on or hands-off giving, with anonymity or recognition.
- **Comprehensive Management and Risk Reduction** from grant-making and regulatory reporting to impact validation and rigorous due diligence, ensuring your contributions are secure and effective.
- **Expert Guidance and Collaboration** to involve family or stakeholders in your giving journey and connect with like-minded people through networking and collaborative funding opportunities to amplify your impact.
- **Custom Solutions with Strategic Impact** aligned with your unique vision, providing opportunities to address pressing needs or emerging opportunities while maximizing your contribution's effect.
- **Transparent Results** with detailed updates and impact reports.

Discover the Benefits of Donor Advised Funds

A Donor Advised Fund (DAF) offers an individual, family or business all the advantages of creating their own named Charitable Fund, but without the complexity, high costs and administrative and regulatory burdens, associated with setting up and managing a charitable trust.

This freedom makes it easier for you to focus on all the causes you want to support.

At the Community Foundation for Northern Ireland, we offer tailored, impactful, and cost-effective philanthropic giving solutions enabling you to maximise your impact.

Our DAFs are thoughtfully structured to align with a variety of donor needs, allowing you to bring your charitable vision to life and

fund-holders can be involved as little or as much as they wish in the grant-making process.

Key Features Include:

- **Tax Advantages:** Enjoy immediate tax deductions, avoid capital gains tax on appreciated securities, and allow funds to grow tax-free.
- **Investment Opportunities:** Access institutional and responsible investment options, including ESG-screened portfolios, for tax-free growth.
- **Flexible Giving:** Decide how and when to give, name the fund, involve family, and choose anonymity if desired.
- **Strategic Support and Planning:** Use DAFs for estate planning, charitable giving, and access advisory and strategic philanthropic support.

The Meliora Trust

“ I have been an Ambassador for CFNI for many years, but when I sold my business in 2021 I was in a position to make a financial donation to something that I really cared about.

Knowing the service that was available from CFNI in setting up and managing Trusts, it was the obvious choice for me.

The team at CFNI made the process really easy and the Trust I set up with my husband was up and running with little work for us to do!

We were particularly delighted with the match-funding that was available from CFNI which made our donation go further.

On an ongoing basis we are able to top up the fund, again with minimum effort from us, and to give effectively and efficiently.

Our fund, called the Meliora Trust, is for Refugees and Asylum Seekers.

CFNI provides us with updates on the specific people and community organisations we are able to assist and also helps us to decide where to direct support.

It is always encouraging to receive feedback and to know that we can make a small difference.

For anyone who is thinking of making a charitable donation

I would highly recommend using CFNI.

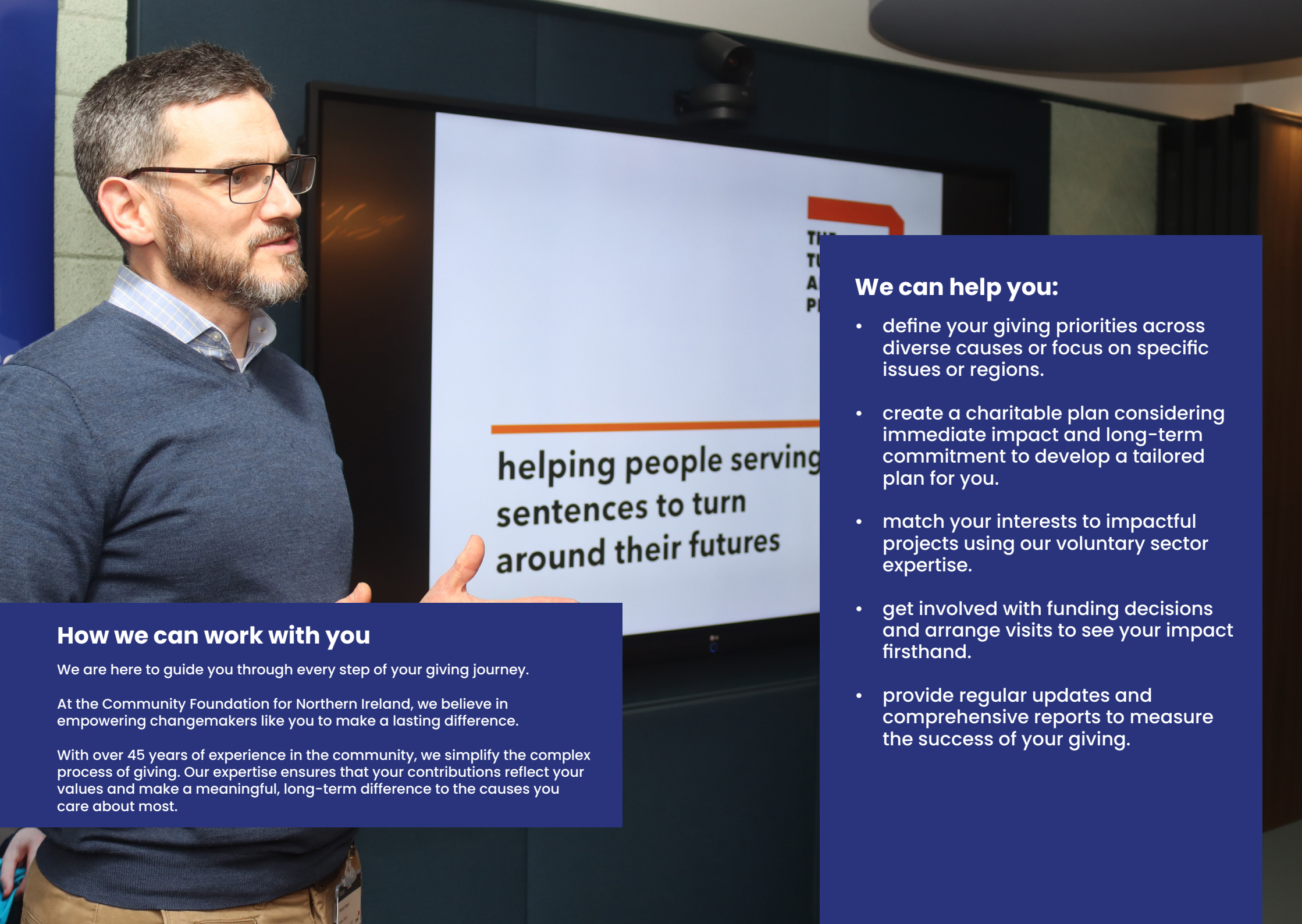
It is an excellent way to maximise giving, especially where match-funding is available, as well as being easy, effective and efficient.

Dorcas EA Crawford ”



“CFNI provides us with updates on the specific people and community organisations we are able to assist and also helps us to decide where to direct support.”





How we can work with you

We are here to guide you through every step of your giving journey.

At the Community Foundation for Northern Ireland, we believe in empowering changemakers like you to make a lasting difference.

With over 45 years of experience in the community, we simplify the complex process of giving. Our expertise ensures that your contributions reflect your values and make a meaningful, long-term difference to the causes you care about most.

We can help you:

- define your giving priorities across diverse causes or focus on specific issues or regions.
- create a charitable plan considering immediate impact and long-term commitment to develop a tailored plan for you.
- match your interests to impactful projects using our voluntary sector expertise.
- get involved with funding decisions and arrange visits to see your impact firsthand.
- provide regular updates and comprehensive reports to measure the success of your giving.

Tailored Solutions for Your Donor Advised Fund

Setting up a Donor Advised Fund is a highly personal journey, shaped by your desires and giving ambitions.

Whether you aim to create an immediate, short-term impact or prefer to invest for the long term building a lasting legacy, the choice is yours.

We offer a flexible approach ensuring your funds are managed in a way that aligns with your vision and maximises impact.

A named Donor Advised Fund can be set up in two ways:

Flow Through Fund

A Flow Through Fund acts like a philanthropic current account which is distributed in full over a set period of time.

It offers flexibility to spend or top up as needed. Ideal for one-off or short-term giving, donors can address pressing needs or commit to multi-year projects.

This is a great starting point for purposeful and impactful giving and fund holders can be involved as much as they wish in the grant making process.

We can offer this option for fund levels of £50,000 or above.

Endowment Fund

Endowment Funds are perpetual, leaving a lasting legacy. Donated capital is invested indefinitely to generate ongoing returns for investment and the opportunity to pass the heritage of giving on to the next generation of their own family.

Donors can support chosen causes year after year and can be involved as much as they wish in the grant making process. We can offer this type of fund for levels of £200,000 or above.

Contribute to an Existing or Thematic Fund

The Community Foundation for Northern Ireland brings focus to some of the key issues facing communities through its existing and thematic funds, pooling resources with like-minded individuals to broaden reach and impact.

- **The Inspiring Growth Fund:** Builds capacity for local charities to adapt, thrive, and deliver lasting positive impacts.
- **Thematic Funds:** These funds address specific issues such as women's empowerment, social justice, human rights, or support for specific groups such as older people and asylum seekers.
- **CFNI Endowment:** Contribute to help build thriving, equitable communities.



Getting in Touch

To learn more about how the Community Foundation for Northern Ireland can support your company's philanthropic journey, please contact us at giving@communityfoundationni.org or call us on +44 (0) 28 9024 5927

The smallest
good deed is better
than the grandest
intention

—Unknown

The Community Foundation Northern Ireland

Working hand in hand
with communities to build
a better future.

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