



# Philanthropy: Changing Lives

Inspiring stories of local people giving where they live



“ Each fund within the Foundation is unique in its motivations, aims and methods of giving but all of them are linked by a passion to make Surrey the best it can be ”

David Frank, Chairman  
**Community Foundation for Surrey**

### **Acknowledgements**

With thanks to all our donors and continued supporters but especially those who generously offered to share their experiences of local philanthropy and of working with the Community Foundation for Surrey.

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# Contents

- 4 Foreword
- 5 Introduction
- 6 Working with the Community Foundation for Surrey
- 8 Nigel and Alison and Family  
Sharing the joy of giving across generations
- 10 Rodney and Linda  
Personal philanthropy inspired by professional experience
- 12 Tony  
Joining with others to support a local part of Surrey
- 14 John  
Inspired by a passion for sport
- 16 Bryan  
Advising others on the benefits of philanthropy
- 18 Tom  
Making philanthropy a part of corporate culture
- 20 Sue and Vicky  
Ensuring a family trust is most effective locally
- 22 Join us to make a difference

# Foreword

The Private Office at Investec Wealth & Investment is delighted to be supporting the Community Foundation for Surrey's Philanthropy: Changing Lives brochure.

Through our work advising our clients, we know that philanthropy is a deeply personal choice based on individual passions, interests and experience. The Foundation makes it easy for its donors to connect with their goals, ensuring that philanthropy is both impactful and uncomplicated.

Our relationship with the Foundation has seen it build long-term funding that will support Surrey



Tom Street, Managing Director  
**Investec Wealth & Investment**

both now and in the future. Donors who have chosen to establish an endowment fund see their initial investment support worthy causes each year, in perpetuity.

We hope that the stories told in this brochure resonate with you and acquaint you with ideas and causes that may strike a chord and encourage you to start your own philanthropic journey. The Foundation is a very able partner.

# Introduction

The Community Foundation for Surrey has brought together a family of donors who are committed to changing lives across Surrey.

The Foundation now works together with a range of individuals, corporates and charitable trusts, connecting those who want to give with local communities that require support. Much of this giving is happening right now, having an immediate impact on those in need. A significant amount is invested, ensuring an ongoing legacy for the local community into the future.

The Foundation, together with its donors, tackles a wide range of need that includes difficult issues such as homelessness, mental ill health and poverty. Individuals have established their



David Frank, Chairman  
**Community Foundation for Surrey**

own personal funds to further causes that matter to them whilst other donors have come together to form collective funds. Each fund within the Foundation is unique in its motivations, aims and methods of giving but all of them are linked by a passion to make Surrey the best it can be.

In the following pages, you will find the stories of just some of our supporters and their experiences of working with the Foundation. We hope that their stories will also inspire you to join us in making a real and lasting difference.

# Working with the Community Foundation for Surrey

The Foundation makes meaningful connections between people who truly care about their local community and causes that matter.

With a range of giving options, the Foundation can assist you to channel your giving to where it will be most effective on a local level, regardless of the financial or time commitment you wish to make. By taking the time to understand your passions and motivation for philanthropy, the Foundation can tailor the most effective giving solution for your requirements.

The donors highlighted in this publication have very different backgrounds and interests and give to the Foundation in different ways. All of them are part of our family of donors and are committed to addressing local needs in Surrey.

By working on a local level, our donors can see the impact that their support has on people in need. The Foundation also offers the opportunity to visit projects, meaning that donors can see exactly what their money has enabled.

If you're interested in supporting your local community, please contact us so that we can learn more about your wishes.

# How it Works



Real impact  
can be seen  
at a local level



Money is awarded to  
enable charities and  
volunteer groups to tackle  
a range of needs across Surrey



Local people who are  
passionate about Surrey  
want to support local  
causes in an effective way



The Foundation enables  
donors to make meaningful  
connections with local Surrey  
charities and voluntary groups  
that require support



## **Nigel, Alison and family**

### Sharing the joy of giving across generations

Following careers as an actuary and teacher respectively, Nigel and Alison helped to establish a youth project in one of the most socially deprived areas of Surrey.

“Through establishing a youth charity in Surrey, we learned how a small amount of money could make a difference to the lives of those experiencing disadvantage” explains Nigel. Applying for funding for the charity brought them into contact with the Foundation for the first time.

“After making several grant applications, it was clear that the Foundation provided an indispensable service bringing together those who had money to give with those who needed funding. Most importantly, they were professional in

“ We have been fortunate and we wanted to share our luck with some of those who were less privileged ”

making sure that the money was used appropriately by the charities. Establishing our own fund with the Foundation seemed the right thing to do.

Our fund includes our children, Carol and David, and their families and so our endowment will continue making gifts on behalf of the family well into the future. We have loved visiting the projects we award grants to, and seeing the very positive effect that our money has.

Having worked in business my whole career, I wanted the best return on our money and the Foundation was the perfect solution.”

### **How the family's giving is changing lives**

“So much of the support we have given has provided us with great pleasure. One example that comes to mind is a grant to hire a church hall for a weekly parent and toddler group that would otherwise have closed. A couple of mothers were running a great little group and



all they needed was a small amount of money to continue hiring the church hall. Talking to the parents it was clear that the group was a lifeline to them and, in some cases, was the only time they got out of their houses.

For a relatively small amount of money, a significant difference was made to their lives. The return on the investment made was much better than any investment I made during my business career.”

“No one is as effective at linking donors with charitable organisations and ensuring that our support is used to the best effect”



**Above:** Nigel and Alison's family fund is making a difference to the lives of local people across the county

## Quick Q&A

### How has philanthropy changed your life?

We have met lovely people including other donors, those who are giving up their time for the benefit of others and the beneficiaries of the charities we have supported. It is a privilege to know all these people. Most of all, it has been fun!

### What piece of advice would you give to those new to philanthropy and thinking about giving?

Do it now! It will bring more blessings to your life than you can imagine.

### Why is local philanthropy important today?

National and local government does not have the knowledge or resource to look after local communities; this largely needs to be undertaken by those in the community itself. Philanthropy includes both the giving of money and the giving of time to help each other and every member of the community can play a part in this.



“We have our own fund that focuses on our interests and we can be as involved as we wish”

**Left:** The support provided by Rodney and Linda's fund helps local families to really thrive

## Rodney and Linda

### Personal philanthropy inspired by professional experience

Prior to retirement, Rodney advised clients on how to manage their money, including advice on charitable giving. Linda spent much of her teaching career supporting children with special needs, many of whom also had major family issues. They now use what they learnt during their careers in their work with the Foundation.

“By working with the Foundation, we do not have the burden and costs of compliance with the Charity Commission had we set up our own charitable trust.

We have visited projects and had huge support from the Foundation's team who source and assess applications for us to consider and

have introduced us to fellow philanthropists. We have made some exciting grants, learned a lot and uncovered the hidden Surrey behind the wealthy exterior.”

### How the couple's giving is changing lives

“The project that stands out to us is Home-Start, which supports families with young children and helps them deal with the challenges they face, through volunteers making home visits. We were horrified to discover that our local branch in Elmbridge had 30 people ready to become volunteers to help local families but were unable to fund their training.

It was a real joy for us to be able to provide the money for that training. We visited the volunteers on their last day of training and found that not only had they built the skills required to help but they had become a team, made new friends and built a support network amongst themselves.”



“Driven by the needs of the local community, the support of the Foundation is here for today and the long term”



**Top and above:** Home-Start Elmbridge's trained volunteers help local families deal with whatever life throws at them

## Quick Q&A

### How has philanthropy changed your life?

It is something we can do together and we can be as involved as we can, without committing large amounts of our time.

### What piece of advice would you give to those new to philanthropy and thinking about giving?

We have learned that it doesn't take a huge amount of money to make a difference. Giving with the Foundation is tax efficient and they can help you make the most of your money, no matter the size of your donation. You can share the joy of giving with your family whilst minimising the legal and financial responsibility associated with charitable giving.

### Why is local philanthropy important today?

By giving locally through the Foundation, we have the privilege of supporting needs we would not otherwise have known about.



## Tony

### Joining with others to support a local part of Surrey

Tony benefited from the generosity of charities and the church whilst growing up as part of an immigrant family. He has a strong sense of duty to give back to the communities who have been good to him. He's lived and worked in Surrey for over 30 years where he has built and sold several businesses, raised his family and been closely involved with local charities and the church.

"We should all give back if we can; it's our duty as citizens. Surrey has been good to me and my family. I brought my children up here and it's a great place to live, there is a strong sense of community and that is important to me. You can live anywhere but I would much

**“ Due to my business commitments the one thing I am really short on is time. I admire people who volunteer and give their time to help others and I’m glad my money can help them do that ”**

rather live somewhere where you can have meaningful relationships with people.

I was attracted to give to the Elmbridge Community Fund, a very local fund within the Foundation that anyone can donate to. I see exactly what happens with my money and it supports a whole mix of needs. I also like that it is a sustainable fund and its legacy will carry on forever. It doesn't have many administrative costs and so the money goes to where it counts – the community.

By working with other local donors to develop the Elmbridge Community Fund and adding our little bits together we have had a greater impact.

So often when donating to bigger organisations your little bit can get lost, but by working with the Foundation I gain the advantages of being part of something bigger and still see where my money is going.”



### How working together is changing lives

“Support that really sticks in my mind was to the Oasis Children’s Centre, which works with vulnerable families and their children in the area. It was a shocking case and it completely shook my preconceived notions of need. By supporting young children and families our grant helped the local community to break a cycle of disadvantage from repeating for the next generation.”

“Giving money is a great thing but giving it in an effective way is even more important”



**Above:** Oasis Children’s Centre provides essential support to children in need and their families across Elmbridge

## Quick Q&A

### How has philanthropy changed your life?

I’ve realised there is often much more joy in giving than receiving.

### What piece of advice would you give to those new to philanthropy and thinking about giving?

Go steadily and do it with reliable trustworthy people who have a proven track record. I know my money is going to be administered well by the Foundation.

### Why is local philanthropy important today?

Because it affects where you live. I am a great believer in ‘you reap what you sow’ and that if you do good, you get good back.



## John

### Inspired by a passion for sport

A junior tennis champion for Leicestershire, John also played squash, rugby, hockey, sailed and boxed. He and his family first moved to Surrey in 1972 and have always regarded it as their permanent home, even during a stint when John worked in Hong Kong.

"I have been involved in several interesting charitable ventures, which I have found personally very rewarding. When the idea of the Surrey Sports Fund was proposed by the Foundation, it appealed to me because I myself had so much enjoyed many forms of sport and the contacts thereby made had opened up many doors for me. I was therefore very keen to encourage people to engage in sport, especially those who may struggle to do so without help, such as the provision of equipment or coaching.

**“ Having played sport all my life, I am delighted to give to the Surrey Sports Fund. It is a collective fund so anyone in Surrey who is passionate about sport can donate ”**

If I gave to a national sports charity, it would go into a large pot and its use be remote. With the Foundation, I know that a relatively small grant can make a real difference to the lives of local people and I can go and see how it is actually being used. Before a grant is made, the Foundation will ensure as far as possible that the money will not be wasted. I do not have the time or expertise to do this.

Some wonderful people are involved in the running of these projects and it's good to come across them in a world where people are depicted as having become so much more self-centred. They really are changing lives for the better."

### How John's passion is changing lives

"One project that was outstanding is the Frensham Pond Sailability project, which offers people who require support because of a long-term illness or disability the opportunity

to sail. They are very inspiring and a particularly well run organisation. I also enjoyed visiting a local boxing club; that was good fun, although boxing has changed from my time! There was a session going on when I visited and a couple of the parents watching commented on what a tremendous difference it had made to their sons who had been struggling with their schoolwork but who had really pulled around since they started to attend the club.”

“I can visit the projects that money goes into, which has been extremely interesting and rewarding”



**Above:** Frensham Pond Sailability gives people with disabilities a new sense of freedom

## Quick Q&A

### How has philanthropy changed your life?

It has made me more aware of just how jolly lucky I have been compared to a lot of people with less privileged backgrounds. It's so difficult for some of these young people to participate in sport but the Surrey Sports Fund tries to remove these barriers.

### What piece of advice would you give to those new to philanthropy and thinking about giving?

Do try and look at the projects that you're being introduced to, it's such a rewarding experience.

### Why is local philanthropy important today?

Local philanthropy is more important than ever now because of a shortage of government funding. Those of us who are reasonably well off must take a grip of what is happening in our communities more and more.



## **Bryan** Advising others on the benefits of philanthropy

Bryan is a retired solicitor who, for over 50 years, served the community in numerous activities and causes including trusts and testamentary counselling.

Over the years more people have come to recognise the importance of testamentary instruction when mortality becomes a reality and they are concerned about inheritance tax, which many regard as unfair. In this context, Bryan recalls those who have died content in the knowledge that they have left substantial sums to charity.

Having served as a trustee on many local trusts, Bryan recognised the concerns for trustees such

**“ Learning of the Foundation and recognising its relevance in the community I realised how beneficial it would be for small trusts to transfer to the umbrella of the Community Foundation ”**

as the responsibility of trusteeship, compliance, audit and heavy administration costs.

“The advantages of partnering with the Foundation are immediate: release from legal responsibility as a trustee, continuing involvement as a panel member, better management, advice and expertise plus the opportunity to meet amazing people who are the inspiration for the charities they serve” explains Bryan.

Since 2006, Bryan has witnessed four local trusts that have benefited from working with the Foundation. One of these is the Challice Trust whose former patron, Ruth Challice Bush, lived in the Haslemere area and actively served the community as well as being financially generous. Since transfer to the Foundation, the Haslemere Challice Fund has grown dramatically both in value and the funds it distributes.

Bryan believes community spirit to be at the heart of this country's heritage and cultural



identity. "Haslemere is a good example of a town where community spirit is active and apparent. Haslemere Museum, Haslemere Hall and now Haslewey Community Centre have been supported by so many volunteers, but also by funding from the Foundation. Organisations like these are the pillars of the community and their work continues not through public funding but through donations, testamentary gifts and the unstinting loyalty of their volunteers."

**“The Foundation is a perfect vehicle for small trusts to become a part as they experience the benefits, without the burdens”**



**Above:** Haslewey Community Centre offers a warm welcome and a range of activities for local people of all ages

## Quick Q&A

### **How has philanthropy changed your life?**

It has made me aware and grateful for what we have. Action is more important than lip service. The reward of philanthropy is the achievement brought by the good work of charities and citizens. The motto "what I can give is never as much as I get from giving" is a constant reminder.

### **What piece of advice would you give to those new to philanthropy and thinking about giving?**

Harness the joy of giving something to the community. Heed everything that is on offer and seize upon the moment to do something really positive.

### **Why is local philanthropy important today?**

As the government funding available contracts, so the call for help becomes greater. Philanthropic organisations, such as the Foundation, are needed more than ever to fill the widening gap between cause and effect.



## **Tom, CEO, Gold-i** Making philanthropy a part of corporate culture

Originally from Guildford, Tom returned to the area with his family following a number of years in London. In 2008, he started Gold-i, a now leading technology company based on the Surrey Research Park. Not long after forming Gold-i, Tom decided that the company should give to charity. Initially this was done on an ad-hoc basis.

“As Gold-i grew, our charitable efforts became too random. Charitable giving wasn’t our expertise and we decided that the time had come to engage an organisation with huge experience and an excellent reputation.

Through our Gold-i Innovation Fund within the Foundation we now support groups that are

“**Working in partnership  
with the Foundation allowed  
us to develop a clear theme  
to our giving that echoes  
the business**”

attempting to do something innovative. Gold-i won The Queen’s Award for Enterprise in Innovation in 2014 so it is key to us. The local angle was also important to us as I have always considered Gold-i a local company and have attempted to recruit from within the area.

By working with the Foundation, we have relieved the administrative pressures of our giving and ensured the best outcome for local charities. We had some pre-conceived ideas about what we might give to but the Foundation has presented us with innovative projects that we would never have known about without them.

I feel passionately that our culture and values as a company have improved since the inception of the Gold-i Innovation Fund. It’s important that it’s not just me choosing who we support, but that employees from across the company have equal input and get to share in the joy of giving. We’ve gone on to build lasting relationships with some of these charities.”

### How this local business is changing lives

“I was really glad to be able to make a grant to Challengers, they do fantastic work. No council service could replicate the service that they offer to the families of disabled children. We were so impressed with how strong-minded they were and their dynamics made us feel completely at home. One of our employees, Arun Lakhani, was so moved by their work that he now volunteers with them.”

“We understand there are problems everywhere, but it makes sense to work locally where we can have a direct effect on those near to us”



**Above:** Gold-i staff team presenting their recent support at Challengers' Guildford Play Centre

## Quick Q&A

### How can philanthropy change corporate life?

The staff are so proud to see local media coverage of our philanthropic efforts and it has made our culture even stronger; there is a real feel good factor in the office.

### What piece of advice would you give to those new to philanthropy and thinking about giving?

Work with an expert partner like the Community Foundation, don't try to do it all yourself. Do it properly, involve your employees and see the result of your work and the choices they've made. If you just put a cheque in the post, you'll miss out on so many benefits.

### Why is local philanthropy important today?

Even in affluent Surrey, there are disadvantaged people and those in poverty who don't get any additional help unless we support them.



## **Sue and Vicky** Ensuring a family trust is most effective locally

The Pargiter Trust is a family trust established by the Honorable Mrs Isobel Cooper-Heyman in 2005 to support older people to age with dignity and independence, and to lead healthy and active lives. The Trust's board is a family enterprise, chaired by Isobel's cousin, Sue.

With fellow trustee and cousin Vicky, Sue led an internal committee, sourcing and assessing grant applications but quickly learned that giving money away strategically was incredibly difficult. Sue explains "neither of us had the time or capacity required to make the volume or quality of grants we wanted to."

**“ The Foundation provides a fantastic mechanism for us to support local people and acts as a gateway to grassroots community groups we otherwise may not have known about ”**

Vicky adds "I followed the Foundation's progress as it grew and I could see the opportunity to work with this local organisation I trusted." Sue continues "The skills and knowledge of the staff at the Foundation enable us to deliver our grant making strategically whilst keeping our over-heads low.

We also chose the Foundation because it was local, offered us the opportunity to stay involved in the giving process and visit the projects we supported. It has provided an opportunity to work with other donors to co-fund projects, helping us award larger grants and make our money have greater impact.

You could give money to a charity and never see where it goes. With the Foundation, we get to see the difference; we are really lucky to have the opportunity to help others and witness the impact it has in the local community."

### How this family trust is changing lives

“The Men in Sheds movement supports older men who want to get together, share and learn new skills. Meeting one ‘Shedder’ in particular has really stuck with us. He told us that before joining the project he didn’t want to wake up in the mornings. Attending meant he made new friends, helped other people and had a purpose. Funding a project that is the difference for someone between wanting to wake up or not is more than we could have ever asked for.”

“ Sometimes seeing the difference you have made to someone’s life can make a bad day good ”



**Above:** Men in Sheds allows older men to socialise, make new friends and practise carpentry and other skills

## Quick Q&A

### How has philanthropy changed your life?

It has broadened our horizons and given us a completely different perspective. We are always amazed by how many people are out there helping others and achieving so much with so little. It’s a privilege as well as being rewarding.

### What piece of advice would you give to those new to philanthropy and thinking about giving?

Find something that inspires you to give and surround yourself with people who can help you and you can trust.

### Why is local philanthropy important today?

By giving locally you can see your grants in action and engage with the beneficiaries to learn more about your local community.

# Join us to make a difference

We hope that the diverse stories in this publication have shown how local philanthropy can change the lives of those in need in Surrey.

No matter the financial or time commitment you are considering, we can work together with you to find a solution that will satisfy your philanthropic motivations.

## **Personal Funds**

Many of our donors choose to establish their own personal funds with us. These bespoke funds are tailored to each individual or family and can address a wide range of needs across the county.

Funds can be established immediately, or as a legacy by way of a testamentary gift. The Foundation encourages the building of long-term funding in order to provide support both now and in the future.

## **Collective Giving**

If you are dedicated to your local community, our collective area funds bring together donors wishing to support groups within their local area. By pooling donations from local people and companies, the funds can have a bigger impact and develop the capacity to respond to local issues as they arise.

Similarly, for those interested in working with others to support a specific cause such as sports or the arts, we have a variety of themed funds that operate across the county.

## **Corporate Giving**

Working with the Foundation can form a key aspect of a company's corporate social engagement programme. Several of our corporate donors involve a wide cross-section of their employees.

## **Working with Charitable Trusts**

We have also developed relationships with renowned national charitable trusts to maximise the effect of their giving in Surrey.

If you have been inspired and want to join with like-minded people to make a difference, we encourage you to contact us and discuss your motivations and requirements further.

**We look forward to hearing from you!**



**Community Foundation for Surrey**

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