



## Annual Review 2013-14

*Hertfordshire is often perceived as a pretty and prosperous county, used as a commuter base for many working in London, and it's true that parts of the county are like that. But there are also parts with high levels of deprivation, both absolute and relative, where individuals, families and even communities are in need of help and support.*

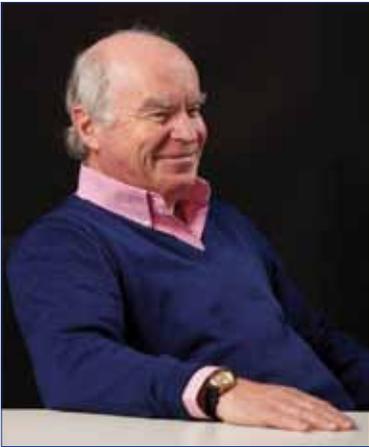
**On the front cover:**

In November 2013, HCF made a grant of £9500 from the Comic Relief Local Communities Fund to the North Herts Disability Sports Association to help them buy 12 new specialist wheelchairs. The grant means they can provide the opportunity for both able bodied and disabled young people to enjoy the sport of wheelchair basketball, including our cover star George!

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## A message from our Chairman...



**Gerald Corbett**  
Chairman

The last year has been one of further solid progress by the Hertfordshire Community Foundation. The changes required by the reduction in Government funding in the county are now well behind us. Our Foundation has been reconfigured, is living within its means and like all successful organisations is doing more with less.

Our Foundation Director describes much of what has been achieved in his review. Of particular note is our endowment increasing to over £8m, the number of funds managed by the Foundation growing to almost 90 and all the improvements made to our grant giving and the way we present and market ourselves.

At the end of the 2014/2015 financial year, we will be adopting incorporated status to bring us in line with best practice and other Community Foundations. Our Fund holders and the charities we support should notice no difference.

For the first time our summer reception, held at the home of our trustee Henry Holland-Hibbert included representatives from the charities we support as well as fund holders, ambassadors, friends and trustees. It was a beautiful June evening in the Hertfordshire countryside and reminded us all of the work our Foundation does, the breadth of its reach, the generosity of our fund holders and the tireless endeavours of our capable and committed executive team.

Onwards and upwards!

# Foundation Director's report

We are delighted that over the past year many more families have decided to support their local community by establishing local 'named funds' and these funds have been boosted significantly by 'Community First' the government match funding programme, which ends on the 31st March 2015. The match funding has been a tremendous incentive to encourage local philanthropy and with the end of the programme fast approaching we very much encourage individuals, companies and other organisations to take advantage of this time limited opportunity.

We are also delighted to announce the opening of the Nigel Copping Community Building. The Foundation has been working in partnership with long standing local resident and ex councillor Nigel Copping to develop a new community resource for both the local community and the wider district of East Herts. As well as being the new home of CVS Broxbourne and East Herts, other groups and organisations will be able to access the fully equipped meeting rooms and make use of the community hall provided by this energy efficient building.

Over the past year the Foundation has also launched its new website and logo and has successfully completed its Charity Commission endorsed Quality Accreditation, which encourages best practice in the UK Community Foundation network. Also, in order to become a more effective grant maker for both our fund holders and the local community, we have changed the way we manage our grants process, which you can find out more about in this report.

Looking to the year ahead, we hope to continue the work of raising endowment to further build our support for community groups across Hertfordshire. Named funds provide an excellent way for families and companies to support their local communities in a cost effective and tax efficient way and often tailored to specific donor needs and with the last opportunity to receive the government's 50 per cent boost.

We very much thank our supporters for continuing to make a difference in the county and look forward to expanding our donor base and introducing others to the work of the Foundation.

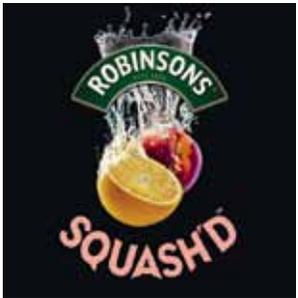


**Jonathan Aves**  
Foundation Director

“Hertfordshire Community Foundation is committed to improving the lives of disadvantaged people across Hertfordshire and by working in partnership with families, companies and other organisations we are continuing to make a difference.”



**PROUD TO BE SUPPORTING**



**OUR COMMUNITIES**

**Making Life's Everyday Moments More Enjoyable.**



## Working with local companies...

Hertfordshire is home to a thriving business community, from small local enterprises to multi-national companies with headquarters based in the county. For many of them, being able to give back to the local area is an important part of their mission.

By channelling their giving through Hertfordshire Community Foundation, companies can benefit from our local expertise, connections and support as we work together to ensure their giving is effective for both the company and the community.

UK soft drinks manufacturer Britvic Soft Drinks moved their head office to Hemel Hempstead in April 2012. The company has a strong history of supporting local communities and has continued this commitment by starting a fund at Hertfordshire Community Foundation, following years of success working with the Essex Community Foundation when they were based in Chelmsford.

To date, their local community work has included volunteering in the Hertfordshire Dragons' Apprentice Scheme with local schools, donating to the Herts 100 Club and supporting a programme which enables companies and individuals to collectively make a difference to areas of real deprivation, where people lead extremely difficult lives. Britvic also supported a local charity that creates life changing experiences for young, disadvantaged and disabled people by offering them the opportunity to experience sailing on the Grand Union Canal in Hertfordshire on a specially adapted canal boat.

“*Working with the Community Foundations, both in Essex and now Hertfordshire, has been a great way of connecting with groups and activities right on our doorstep, many of which we wouldn't have known about otherwise.*

*We've also been able to maximise our giving ability by benefitting from the Community First Match Funding Programme which gave all our donations a 50% uplift. And, the Community Foundation takes on the responsibility of the administration, doing the due diligence and monitoring how the money is spent, so we can be confident we're investing in good organisations and really making a difference to the local community.*”

**Susan Turner**  
Britvic's Director of  
Corporate Affairs

## **PRIORITY ONE: Disadvantaged Children and Families**

We know that there are families in Hertfordshire who need support for a whole range of reasons. We support them through funding groups including:

- Grandparents Association who received £3000 to provide Drop in Sessions for grandparents who have to raise their grandchildren, provide childcare or have contact issues.
- Sky Badger who received £1960 to help disabled children and their families in the county find and use local specialist services and support groups through a dedicated website.
- BrQthru who received £4098 to provide parenting courses and play therapy.

We also provide direct grant to families through the Hertfordshire Children's Fund.

In 2013/2014 the fund made 63 grants to a total value of £12,226.

This fund is aimed at helping families in crisis by making small grants of up to £300 to help parents provide the basics for their children e.g. a cooker to enable them to provide fresh healthy meals, beds and bedding to make sure the child has somewhere safe and comfortable to sleep or specialist equipment to help families meet the needs of their disabled child.



## Family philanthropy...

Over the past few years, how people give to charity has changed. Instead of giving to large national, or even international charities, many are choosing to focus their giving more locally. They want to make a difference to their local communities, to give something back to those a bit closer to home. That trend has been reflected in the increase in the number of family funds being started at the Foundation.

The Quercus Fund is a great example. Started by three families, all of whom were interested in supporting organisations working with young people in the Watford area, they wanted to give back and teach the next generation about the value of philanthropy.

“Our children are very lucky to come from stable families and they want for nothing. That’s not the case for so many in our communities. We want our own children to appreciate that and develop a sense of community responsibility and “Giving Back”. We have focused on the young, in part because we want our children involved in the giving and in part because it can make a real difference to those children and families in need of support”

And when the Quercus Fund Holders are sent information about potential groups to support, it is the children who make the decisions.

“We try and get the children together (or as many of them as we can depending on where they are in their lives as many are at the university or first job stage). They then look at the suggested groups, pool their thoughts and make the decisions. Parents do not attend the meeting, instead an aunt from one of the families chairs the meeting, but the decision is completely theirs.”

As for why they choose to give through the Foundation...

“The Foundation provides a channel for giving locally. We all come from Hertfordshire but most of the charities we see are national and often London based so it’s very good to be operating on a more local level. It also provides a tax efficient way of giving and access to benefits including gift aid and match funding programmes as well as the assessment, administration and audit processes and support when it comes to choosing which groups to support.

We look forward to finding out more about the areas of need and deprivation in Hertfordshire, seeing what the charities and community groups are doing on the ground and how even small amounts can make a huge difference. And with the children being engaged in that process, we look forward to a time when they will eventually take on full responsibility for the fund and pass on the same education and experience to future generations.”

Find out more how you can get involved on page 16

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# Making a difference...

HCF's focus has always been on tackling social deprivation in its many and varied forms. With the growing number of individual and family funds joining the Foundation, we were delighted to be able to continue to increase the total value of support provided to the county.

2013/2014 saw a comprehensive review of our grant making to ensure we use the funds available in the most effective way and continue to make a difference to our local communities.

The result is a brand new grants strategy with key changes including:

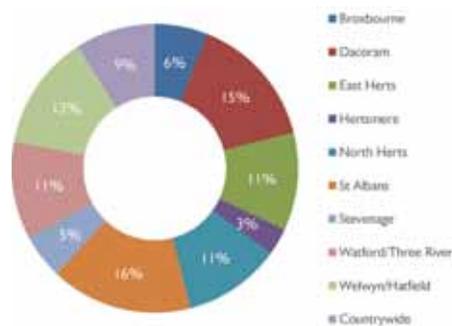
- An increase in the amount available under the small grants programme to reflect the increased costs for groups. Aimed at the smaller grassroots groups, grants of up to £1000 can now be made to help with anything from running costs to capital purchases.
- The large grants of up to £5000 have a renewed focus on our five priority areas with a themed round for each one. This approach is designed to ensure we are addressing a broad range of needs, to help the HCF panel make more effective decisions by being able to compare and contrast similar projects and increase our ability to spot trends, identify gaps in provision and help make connections and share good practice.

Some of the grants stats are shown here with examples of some of the projects we've funded shown throughout the report.

- Total value of direct grant aid: **£359,477**
- Total value of other support and project work: **£433,808**
- Total value of support provided to the county through grants and project work: **£730,544**
- Total number of grants made: **538**

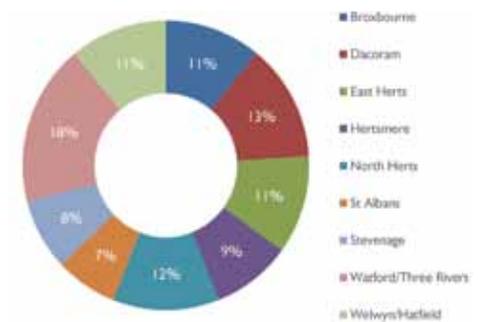
### Groups:

- Number of grants made **153**
- Geographical spread:

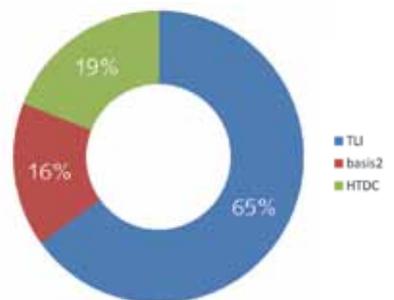


### Individuals:

- Number of grants made to individuals: **385**
- Geographical spread:



### Partnership projects:





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Proud to be supporting  
our local community





## **PRIORITY TWO: Opportunities for young people**

We think it's important that all young people have the opportunity to try new things and access activities, whatever their background or ability.

Grants made this year include:

- £9500 to North Herts Disability Sports Association to buy new basketball wheelchairs for this fully inclusive sports club.
- £1800 to Watford Boxing Club to help replace worn out equipment.
- £3000 to Leisure Direct to help provide activities for those with physical and/or learning disabilities.
- Both Penniwells RDA and Rossway RDA received funding for new equipment to help people of all abilities enjoy the benefits of horse riding.
- CVS St Albans received £5000 to fund a project that introduced over 1500 young people from the district to volunteering.

# Building the capacity of the voluntary sector

## Hertfordshire Training and Development Consortium (HTDC)

Hertfordshire Community Foundation is committed to supporting the county's voluntary sector, not just through grant making, but by providing additional support through our partnership projects. HTDC is our longest partnership and continues to be highly successful. Read on to find out what they've been up to this year...

Hertfordshire Training and Development Consortium (HTDC) continues to be a key partner of Hertfordshire County Council Health and Community Services for the delivery of workforce development programmes for the voluntary sector, securing its 6th consecutive annual contract this year. The programme is delivered county-wide in partnership with the CVSs and Volunteer Centres together with a team of qualified advisors.

In October 2013 HTDC expanded their work with HCC after being appointed to manage a programme of workforce development grants to voluntary sector providers of adult social care. Grants of up to £2000 are available and can be used for the training and development of staff and volunteers or to develop an organisation's own capacity to deliver training. A total of 25 grants were awarded in 2013-14.

HTDC also facilitates regular meetings of the community development workers from 12 of Hertfordshire's major social housing providers with the aim of supporting them to develop projects to support the skills and employability of their residents. In addition, they have maintained bi-annual meetings of the Hertfordshire Financial Capability & Inclusion Forum as on-going issues associated with the Welfare Reforms have focussed attention on the need to share information and resources. The meetings continue to be well attended by a wide range of agencies providing financial education and advice.



## Herts Community Solutions (HCS)

Hertfordshire Community Foundation is one of the founder members of Herts Community Solutions.

This was developed as part of the Transforming Local Infrastructure project, led by HCF, and completed successfully in September 2013. HCS has been set up to enable greater partnership working by infrastructure organisations in order to sustain the delivery of support to frontline VCS groups. The other partners in HCS are CVS Broxbourne & East Herts, Community Action Dacorum, Herts Sports Partnership, North Herts CVS, CVS St Albans & District, Watford & Three Rivers Trust and Welwyn Hatfield CVS. You can find out more on their website: [www.hertscommunitysolutions.org](http://www.hertscommunitysolutions.org)



# Highlights from 2013/14

- In March 2014, the contract with HCC was confirmed for a 6th consecutive year.
- HTDC reaches a membership of over 320 organisations.
- 600 people attended HTDC courses.
- 75 tutors completed their Level 3 qualification to teach.
- Held a successful members conference, “Your Workforce: Your Future” in July 2013, which has been repeated in June 2014.
- HTDC’s website reaches over 5,500 users and becomes recognized as a key “go to” resource for voluntary sector organisations in the county.
- Herts Community Solutions successfully registers as a collective trademark.



Myers Clark is proud to have supported the HCF over this past year, and looks forward to continue this support for the year ahead.

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### **PRIORITY THREE: Access to Education, Employment and Training**

Unemployment is on its way down and we hope aspirations are on their way up thanks to projects such as:

- North Herts Minority Ethnic Forum who received £4950 to provide regular ESOL, IT and sewing classes aimed at BME women.
- Mill End Community and District Community Association who received £4930 to help fund a job club in this deprived area.

We also provided over £82,436 in supported training through our partner project with HTDC. More details can be found on page 12.



## Getting to the grassroots (basis2)

HCF is the lead body for this BIG Lottery funded five year partnership project which has given small voluntary and community organisations access to high quality development support across six districts in the county since September 2009. The project team engages grassroots groups and individuals with ideas to start a group and gives them the support and skills they need to enable them to progress, to become sustainable and to make a real difference in their communities. The aim of the project is to improve the services provided to the community by helping to build the capacity of small voluntary and community groups.

In 2013/14 we provided development support to 66 groups helping them with starting up, governance, training, fundraising strategies, accessing funding, monitoring, marketing, business planning, networking and signposting. This brought the cumulative total to 543 groups and exceeds the overall five year project target of 500 groups, with six months left to go. We also evaluated 100 groups to assess the impact of the support given and their current and likely future needs.

The range of groups supported by the project is diverse and reflects the needs of the districts' communities. This year groups supported include health and support groups, LGBT groups, BME groups, disability support groups, arts, sports and residents' associations groups, groups working with children and with older people plus many others.

Our delivery partners are Broxbourne and East Herts CVS, Community Action Hertsmere, North Herts CVS (including Stevenage from June 13) Stevenage CVS (up until June 2013) and Welwyn Hatfield CVS. Each of the four CVSs hosts a Small Group Development Worker and our focus for the final six months is to continue to build the capacity and resilience of the groups and as far as possible their supporting networks. When the project finishes in October 2014 the plan is for the team to leave a substantial legacy of knowledge, skills and experience, plus practical resources which will continue to benefit existing and newly established groups beyond the life of the project.



# Get involved...

## Start a fund:

We manage almost 90 different funds. Some were started by individuals, some by families or companies and some as the result of releasing money trapped in dormant trust but every single one of them is aimed at making a difference to the residents and communities within Hertfordshire. If you're interested in starting a fund, there are a number of options for you to consider:

### **Endowed funds**

These are for the long term and provide a valuable grant making resource for the county for the future. The money donated to the fund is invested and generates an income. Each year, that income is used for grant making while the bulk of the capital remains so that process can be repeated year after year.

If you're interested in starting an endowed fund, now is a great time to do it as you can currently access match funding through the Community First Programme. It means that for every £1 someone invests in a Community First Fund, the Government will provide an extra 50p. It's been a fantastic incentive for philanthropy and has helped HCF bring in an extra £2 million in endowment since it started. However, if you're interested in making the most of this opportunity, you need to get in fast as it finishes in March 2015!

### **Pass-through Funds**

These are for the short term and are attractive to those who want to make an immediate impact. Any money invested in a pass-through fund can be donated and distributed within the same year using the expertise of the Foundation to direct it where it needs to go with the same reassurance that all the administration and monitoring requirements can be handled by the Foundation and fed back to the Fund Holder. Maximum impact, minimum hassle.

## Contribute to an existing fund:

Not everyone is in the position to start their own named fund, but most people do want to make sure that any money they give is going to be managed well, targeted effectively and makes a real impact and that's not always easy to do. By making a donation to one of the Foundation's own funds, whether it goes in to the main pot or one focused on a specialist area e.g. the Hertfordshire Children's Fund or the Fund for Older People, we'll help your donation make a difference.

## Volunteer:

And if you're more interested in making a personal contribution rather than a financial one, then we're always looking for volunteers. From helping in the office to running the London Marathon, if you want to help then we'd be happy to hear from you!



## **PRIORITY FOUR: Quality of Life for Older People**

We're part of an ageing population and that's bringing new challenges from health problems to social ones including isolation and mobility. We're helping combat some of those by finding groups like this:

- Herts Cricket Board who received £1 300 for a pilot project to provide table cricket to older people's groups in the Welwyn/Hatfield area.
- Groundwork Herts who received £3026 to help fund their GreenAiders project which helps vulnerable, elderly and disabled householders whose gardens have fallen into a state of disrepair and are causing problems including falls, trips, and becoming a target for burglary.
- The Happy Wanderers Club who received £400 to help fund the rising cost of transporting their elderly members to and from activities.
- Parkside Bowls Club who received £446 to help purchase disability aids to help the elderly and disabled participate in the sport.

## PRIORITY FIVE: Building Communities

When times are tough, strong local communities are more important than ever. We're trying to encourage them by providing funding like...

- Welwyn and Hatfield Interfaith group who received £500 to help them in their aim to increase understanding of different faiths and encourage community cohesion.
- CDA Herts who received £5000 to help establish a community garden.
- Supporting various Food banks including those in St Albans, Borehamwood, Bishop's Stortford and others.
- Tring Residents Association who received £5000 and a number of Scout Groups who all received funding towards the cost of repairing and refurbishing community halls.



## Giving new life to old funds...

Many of the funds held at the Foundation are a result of individuals, families or companies wanting to start their own philanthropic journey. But sometimes, a fund comes about not as the result of new donations, but the discovery of old ones.

Across the UK, there are a large number of dormant trusts which have become inactive over the years. It could be because the original charitable objectives have been fulfilled or are too restrictive, the administration had become too time consuming or the Trustees had retired or passed away. Whatever the reason, the result is that funds which were originally intended to make a difference sit untouched and unused.

The good news is that they don't have to stay that way. Hertfordshire Community Foundation is working hard to identify any dormant trusts that could benefit the county and bring them back into use, through an agreed procedure with the Charity Commission.

It enables a dormant trust to be recreated as a 'named fund' within Hertfordshire Community Foundation. They will often keep the same name as the original trust, any remaining trustees can still be involved through advisory panels and the original aims of the trust will provide the foundations for how the fund operates while allowing for amendments to be made to the criteria of the fund if it is felt necessary to ensure its effectiveness. The whole process is designed to ensure the legacy of those that started the trust remains while allowing the fund to meet the needs of today's society.

For example, the Foundation was able to release funds from one trust that had been dormant since the early 1980's. As the original trustees either stepped down or passed away, the administrative burden become too much for those remaining and the trust's activities came to a halt. 30 years later, the family of the former secretary to the trustees found the paperwork and brought it to the Foundation who were able to release the funds, widen the geographical area of the fund to ensure maximum benefit

and access match funding through the current Community First programme. The result? A dormant and inactive trust was transformed into a £45,000 fund ready and able to make grants to support families and young people in Hertfordshire.

A member of the family said: "It was very satisfying for us that funds which had been frozen in a unused charitable trust could be released and then enhanced through the Community First matched funding programme. The Foundation played a pivotal role in ensuring that this happy result was achieved."

As with any of our funds, the Foundation takes on all the responsibilities for investment, administration and compliance with Charity Law as well as soliciting, assessing and monitoring grant applications so there is no risk of the family finding themselves burdened by the same responsibilities as past generations but they are still able to be actively involved in the decision making process.

We know there are many more like this out there but we need your help to find them. If you know of a dormant trust and would like to know more about how we can help you bring it back to life, contact Jonathan Aves, Foundation Director.

And don't forget, if you want to benefit from the current match funding programme like in the case above, you need to do it quickly. The Community First match funding is only available until the 31st March 2015.

# Accounts

## Hertfordshire Community Foundation Statement of Financial Activities for the year ended 31 March 2014

	Unrestricted Funds £	Restricted Funds £	Endowment Funds £	Total 2014 £	Total 2013 £
<b>Incoming Resources</b>					
<i>Incoming resources from generated funds</i>					
Voluntary income	29,932	169,536	630,496	829,964	957,405
Activities for generating funds	10,785	389,688	–	400,473	344,630
Income from Investments	2,528	–	217,702	220,230	207,353
Other incoming resources	30,193	–	–	30,193	30,070
<b>Total incoming resources</b>	<b>73,438</b>	<b>559,224</b>	<b>848,198</b>	<b>1,480,860</b>	<b>1,539,458</b>
<b>Resources expended</b>					
<i>Cost of generating funds</i>					
Costs of generating voluntary income	105,552	164	4,131	109,847	86,608
Charitable activities	118,554	732,154	87,865	938,573	924,675
Governance costs	66,769	–	–	66,769	46,600
<b>Total resources expended</b>	<b>290,875</b>	<b>732,318</b>	<b>91,996</b>	<b>1,115,189</b>	<b>1,057,883</b>
<b>Net incoming resources before transfers</b>	<b>(217,437)</b>	<b>(173,094)</b>	<b>756,202</b>	<b>365,671</b>	<b>481,575</b>
Gross transfers between funds	218,909	3,434	(222,343)	–	–
<b>Net incoming resources before other recognised gains and losses</b>	<b>1,472</b>	<b>(169,660)</b>	<b>533,859</b>	<b>365,671</b>	<b>481,575</b>
<b>Other recognised gains and losses</b>					
Gains/losses on investment assets	–	–	215,858	215,858	590,595
<b>Net movement in funds</b>	<b>1,472</b>	<b>(169,660)</b>	<b>749,717</b>	<b>581,529</b>	<b>1,072,170</b>
<b>Reconciliation of funds</b>					
Total funds brought forward at 1 April 2013	3,781	257,631	7,240,210	7,501,622	6,429,452
<b>Total funds carried forward at 31 March 2014</b>	<b>5,253</b>	<b>87,971</b>	<b>7,989,927</b>	<b>8,083,151</b>	<b>7,501,622</b>

## Hertfordshire Community Foundation Balance Sheet for the year ended 31 March 2014

	2014		2013	
	£	£	£	£
<b>Fixed assets</b>				
Tangible assets		774,389		792,813
Investments		6,700,506		6,378,523
Programme Related Investments		595,894		–
		<hr/>		<hr/>
		8,070,789		7,171,336
<b>Current assets</b>				
Debtors	42,058		90,821	
Short term deposits	–		–	
Cash at bank and in hand	83,872		353,991	
		<hr/>		<hr/>
		125,930		444,812
<b>Creditors: amounts falling due within one year</b>		113,568		109,526
		<hr/>		<hr/>
<b>Net current assets</b>		12,362		335,286
<b>Total assets less current liabilities</b>		8,083,151		7,506,622
<b>Creditors: amounts falling due after more than one year</b>		–		5,000
		<hr/>		<hr/>
<b>Net assets</b>		8,083,151		7,501,622
<b>The funds of the charity</b>				
Endowment funds		7,989,927		7,240,210
Restricted income funds		87,971		257,631
Unrestricted income funds		5,253		3,781
		<hr/>		<hr/>
		8,083,151		7,501,622
		<hr/>		<hr/>

These summarised accounts were approved by the Board of Trustees on 16 September 2014 and signed on their behalf by Gerald Corbett, Chairman.

### Independent Auditors' statement to the Trustees of Hertfordshire Community Foundation

We have examined the summarised financial statements of Hertfordshire Community Foundation.

### Respective responsibilities of trustees and auditors

The Trustees are responsible for preparing the summarised financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Our responsibility is to report to you our opinion on the consistency of the summarised financial statements with the full financial statements and Trustee's Annual Report. We also read other information contained in the summarised annual report and consider the implications for our report if we become aware of any apparent misstatements or material inconsistencies with the summarised financial statements.

### Basis of opinion

We conducted our audit in accordance with International Standards on Auditing (UK and Ireland) issued by the Auditing Practices Board.

### Opinion

In our opinion the summarised financial statements are consistent with the full financial statements and the Trustee's Annual Report of Hertfordshire Community Foundation for the year ended 31 March 2013.

16 September 2014

**Myers Clark**

Chartered Accountants and Statutory Auditors  
Iveco House, Station Road, Watford, Hertfordshire WD17 1DL

# Our funds

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## Staff:

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Alan Clarke

Finance Manager

Helen Doubal

BASIS 2 Project Manager

Caroline Langdell

Fund Manager

Sarah Tisdall

Office Manager

## HTDC/TLI:

Sarah Elliott

Development Worker

Alison Hardy, Business Development Manager

Herts Community Solutions (*left September 2013*)

Ana Siewniak, Administrator

## Volunteers:

The Foundation's activities are enhanced by the help of numerous volunteers for which we are hugely grateful. We would especially like to thank:

Johanna Mason and Caroline McCaffrey JP for their work on the Hertfordshire Children's Fund.

Bob Woods for his help with grants administration.

Simona Lissner for providing additional administrative support.



# SUPPORTERS FORM



## Personal and/or company details

Title ..... Forename(s) ..... Surname..... Suffix .....

Organisation .....

Address .....

.....

..... Post code.....

Tel: .....

Email:.....

Please tick as appropriate:

- I wish to become a Member of Herts 100 (minimum of £1000 per year for 3 years)
- I wish to become a Supporter (minimum £60 per year/£5 per month)
- I wish to become a Friend (minimum £120 per year/£10 per month)
- Please contact me to discuss setting up a Fund
- Please send further details on a Gift in your Will/specimen wording for wills

Payment preferences for Supporters/Friends/Herts 100:

- Option 1 – Complete and return the standing order form overleaf.
- Option 2 – I enclose a cheque for the value of £ .....
- Option 3 – Please issue an invoice to the above address for £ .....

## Gift Aid

I would like Hertfordshire Community Foundation to treat all donations I make from this date until further notice as Gift Aid donations. (Please refer to Gift Aid notes opposite for information.)

Signature ..... Date .....

Please sign where necessary (including the Standing Order form opposite if appropriate) and return your completed form to:

**Jonathan Aves, Foundation Director, Hertfordshire Community Foundation**  
**Foundation House, 2-4 Forum Place, Fiddlebridge Lane, Hatfield, Hertfordshire, AL10 0RN**  
**Tel: 01707 251351 email: jonathan.aves@hertscf.org.uk Registered Charity Number 299438**



# STANDING ORDER FORM



I (insert your full name and title) .....

of (insert address) .....

.....

request you to pay NatWest Bank PLC (60-10-39), 104 Fore Street, Hertford, SG14 1AE for the credit of the Hertfordshire Community Foundation (A/C no. 28592379)

the sum of (amount in figures) £ ..... (amount in words):..... pounds

each  Month  Quarter  year (Please tick appropriate box)

Starting on the ..... day of ..... Year 20.....

Signature ..... Date .....

To (name of bank): .....

Branch address: .....

.....

Account number: ..... Branch sort code: .....

**Hertfordshire Community Foundation, Foundation House, 2-4 Forum Place, Fiddlebridge Lane, Hatfield, Herts AL10 0RN Tel: 01707 251351 Registered Charity No. 299438.**

## Gift Aid Notes – Gift Aid refers to an individual not a company.

1. You can cancel this notification at any time by contacting us.
2. You must pay an amount of income tax and/or capital gains tax at least equal to the tax that we reclaim on your donations in the tax year to which this donation refers. Other taxes such as Vat or Council Tax do not qualify.
3. If in the future your circumstances change and you no longer pay tax on your income and capital gains equal to the tax that we reclaim, you can cancel your declaration. Please contact us immediately.
4. If you pay tax at the higher rate, you may be able to claim further tax relief in your Self Assessment tax return. Our Revenue and Customs reference number is XN82943.
5. If you are unsure whether your donations qualify for Gift Aid tax relief, or if you have any further questions, you can:
  - Consult your financial adviser.
  - Visit the HM Revenue & Customs website: [www.hmrc.gov.uk/individuals/gift-aid.htm](http://www.hmrc.gov.uk/individuals/gift-aid.htm) or call the Self Assessment Helpline on 0161 931 9070 or 0845 900 0444.
  - Contact us at the address above.
6. Please keep a record of all donations you make to charity. This will help if you need to complete a tax return.
7. Please notify us if you change your name, address or bank.

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*Thanks for  
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**Hertfordshire Community Foundation**

Foundation House, 2–4 Forum Place, Fiddlebridge Lane, Hatfield, Herts AL10 0RN

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