



Steps to Establish A Fund

A personalized approach to your charitable giving

Once you have decided to work with Hamilton Community Foundation, the process is quite straightforward.

Face-to-face discussion

Generally, we meet face-to-face to explore your philanthropic wishes and to develop a plan together that meets these objectives. If you decide to establish a fund, some of the areas for exploration and decision include the purpose for which the donation is being made, the type and amount of donation under consideration, naming the fund, the degree of involvement you want to have in making granting decisions, as well as the type of reporting and recognition that you wish to receive.

These discussions form the basis of an understanding between you and HCF as to your philanthropic goals and how the fund will be built and operate. The terms are then drawn up as a written agreement between you and Hamilton Community Foundation.

Donation amounts

Donations of any size are welcome and appreciated at HCF.

Certain types of funds, however, require a minimum amount to enable appropriate administration and grantmaking. In some cases you may choose to build the minimum amount required over time. When a fund is set up through periodic contributions, grantmaking will begin when the minimum balance has been achieved.

There is no minimum donation required to add to any existing fund at HCF.

Vision

A vibrant, inclusive Hamilton

Mission

To drive positive change by connecting people, ideas and resources.

What We Do

We drive positive change by:

- Helping people give in a way that has meaning to them and impact in the community.
- Supporting all aspects of community life through grants and financing to a wide range of charitable organizations and initiatives.
- Engaging in community leadership by bringing people together to address priority issues that affect Hamiltonians.

For more information, contact:

Sheree Meredith

Vice-President, Philanthropic Services
905-523-5600 ext. 246

s.meredith@hamiltoncommunityfoundation.ca

Jill Anderson

Advisor, Philanthropic Services
905-523-5600 ext. 254

j.anderson@hamiltoncommunityfoundation.ca

HCF Facts

Year ended March 31, 2015

- Total assets: \$180 million
- HCF operating expenses: 1.3% of average total assets
- Donations received: \$12.6 million
- Grants: 561 to 227 organizations last year
\$5.8 million last year
\$88 million since 1954
- Impact investing commitment: \$44.9 million
- HCF is one of more than 191 Canadian community foundations who together serve some 90 percent of Canadians.



Visit

www.hamiltoncommunityfoundation.ca

for more information.

 @HamCommFdn

 HamCommFdn

Types of funds - flexibility to meet every donor's needs

Hamilton Community Foundation manages over 300 different funds, providing tremendous flexibility and options tailored to a donor's charitable interests and goals. Broadly, the types of funds we offer are:

Community Fund/Unrestricted funds

These funds are not tied to any specific charity or area of interest by the donor; instead, donors enable the Board of Directors to determine, through research and consultation, where grants should be directed to meet the community's more pressing needs. Donations of any amount are welcome. Donors whose accumulated endowed donations total \$5,000 may choose to have a named fund within the Community Fund, the Arts Endowment Fund or Environment Endowment Fund.

Field-of-interest funds

These funds allow donors to designate a specific interest area (e.g. the environment, children's need, the arts, etc.) to which grants will be made. The Board of Directors selects the most appropriate recipients year by year. The required minimum donation is \$25,000, which may be accumulated over time.

Donor-advised funds

These funds enable donors to be active in recommending the charitable organizations or programs to receive grants. The required minimum donation is \$25,000, which may be accumulated over time.

Designated funds

These funds are established to benefit specific charitable organizations named by the donor. The required minimum donation is \$10,000 for each named charitable beneficiary, which may be accumulated over time.

Agency endowment funds

Charitable organizations may establish funds at HCF to provide a source of income to carry out their work.

Scholarships and bursary funds

These funds assist and encourage students, including those challenged by education costs. The required minimum donation varies depending on the complexity of the program and the administration involved.

Administration funds

These funds support the administration of HCF's community leadership, development, grantmaking and communication programs. Donations of any amount are welcome.