



BERMUDA COMMUNITY
FOUNDATION

Donor Products & Services

The Bermuda Community Foundation is a grant-making organisation that builds endowments and manages charitable funds to support the work of Bermuda's nonprofit sector. We are dedicated to improving the quality of life of people who live in Bermuda by both connecting grant makers with nonprofit organisations, community projects and social innovations and providing direct support ourselves as a funder. We offer Donor Fund Holders a variety of services to enable them to support the community, including:

■ **Fund Profile** We set up an online profile stating your fund's purpose and why it was established. This will be posted on www.bermudacommunityfoundation.bm and GIVEBERMUDA.ORG, highlighting your fund and potentially generating additional funding to the cause or nonprofit about which you care.

■ **Grant Service Administration** Through a grant-making process customised for your donor fund, BCF provides a range of services to ensure that your grant dollars are being used for their intended purpose with maximum impact in the community. As part of this service we will:

- Field phone calls and correspondence from grant seekers.
- Identify qualified and appropriate applicants. Review all grant requests
- Conduct on-site or phone interviews
- Maintain a database of all grant requests, grant awards and status.
- Assist grantees in developing and refining grant requests.
- Process grant recommendations (two cycles per year). Prepare and send award letters and notify those whose proposals are denied.
- Process and verify grant payments.
- Oversee grantee accountability.
- Process incoming gifts and pay grantees.

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■ **Fund Activity Reporting** Our Donor Central site provides access to your fund balance and activity online. It enables you to submit your grant requests to us electronically.

■ **Professional Investment Management Service** Our investment management team has proven experience in sound financial stewardship. All of the BCF's assets are pooled for investment management purposes, minimizing costs and increasing returns. The pooled asset concept provides a small donor with the same high-calibre professional investment advice as a large donor.

■ **Quarterly Fund Reporting** At the end of each fiscal quarter (June 30; September 30; December 31; March 30), you will receive a financial report on the investment returns and grant-making activity of your fund.

■ **BCF's Press Releases.** Our press releases and online presence provide you and your donor fund with third-party recognition for your giving—unless you prefer to give anonymously.

■ **GIVEBERMUDA.ORG** offers unlimited access to information about nonprofits and their work, a grant-making platform and our online campaign tool for donors who wish to raise funds for a specific cause or nonprofit.

■ **Giving Forums** BCF hosts exclusive informational and networking forums open to all donor fund holders. These convenings are a great way to meet other new donors at BCF, to share best practices in philanthropy, examine trends, review ways in which local nonprofit organisations are addressing pressing community issues, and explore giving opportunities.

■ **Publications** Our Annual Report highlights BCF's activities, fiscal management, grants and inspiring donor stories. BCF's periodic reports and issue briefs draw upon new research to examine pressing community issues and potential philanthropic responses.

■ **Donor Recognition or Donor Anonymity** When you make a gift from your fund, an award letter recognizing you by name as the donor is generally sent to the grantee organisation. However, if you wish to remain anonymous, we will ensure that your identity is kept confidential.

Large Donor Funds Services

Donor Funds with endowed account principle balances of over \$1m or those which disburse over \$500,000 per year are eligible for special services.

■ **More Grant Payments** At-will grant payment processing (up to six transactions a year).

■ **BCF-managed RFP Process** We manage a competitive grant application process for your Fund through **GIVEBERMUDA.ORG**, ensuring that you get up-to-date information about nonprofits, their work and critical funding needs.

■ **Public Recognition** We issue a customised press release featuring your Fund and its work.

■ **Grantee Convenings** Once a year, we convene your grantees to discuss the state of the field and the outcomes of your funding support—and provide a summary report of that convening to inform your grant making going forward.



Fee-Based Services

Our small but effective team can arrange customized grant service administration to assist you as an individual, your family or your company in informing all of its charitable activities. These services may be contracted by BCF to external consultants.

■ **Research on Causes You Care About** We regularly gather information and track the many local agencies and programs working in Bermuda. We can help you identify the nonprofit organisations that are making a difference and the areas where you will have the greatest impact. We can also do more in-depth research on a topic or nonprofit organisation in which you are interested and help you evaluate specific programmes.

■ **Giving Strategy** We can work with you to shape your giving strategy, learn more about issues facing the community, or simply become more familiar with effective local nonprofit organisations. Based on what is important to you, the BCF team is able to highlight community issues and help you formulate strategies to respond to these needs.

■ **Giving Inventory** Aligning your mission or legacy and philanthropic activity may start with a giving inventory. In a few short interviews or via a brief survey, we can gather all of the information we need to prepare a comprehensive inventory that addresses the key areas of your giving and community activities, whether you are an individual, a family or a business. The results will be compiled and assessed, providing a basis for goal planning, a vision for community impact and a baseline measure for assessing impact.

■ **Programme Evaluation** As a contracted service, we can facilitate an evaluation of your grant making, the projects and programmes you support.



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***Creating an enduring source
of funds forever dedicated
to the good of Bermuda***

The core work of the Bermuda Community Foundation is made possible by the support of founding investors The Atlantic Philanthropies, RenaissanceRe, Bloomberg Philanthropies, XL Foundation and a private donor



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