

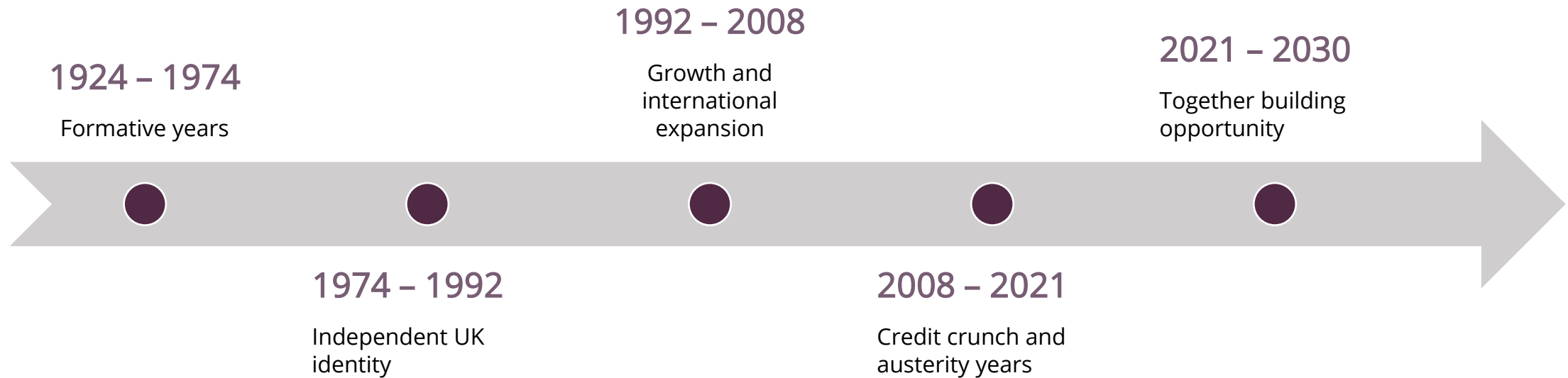


Neil Heslop OBE
Chief Executive, Charities Aid Foundation

Purpose

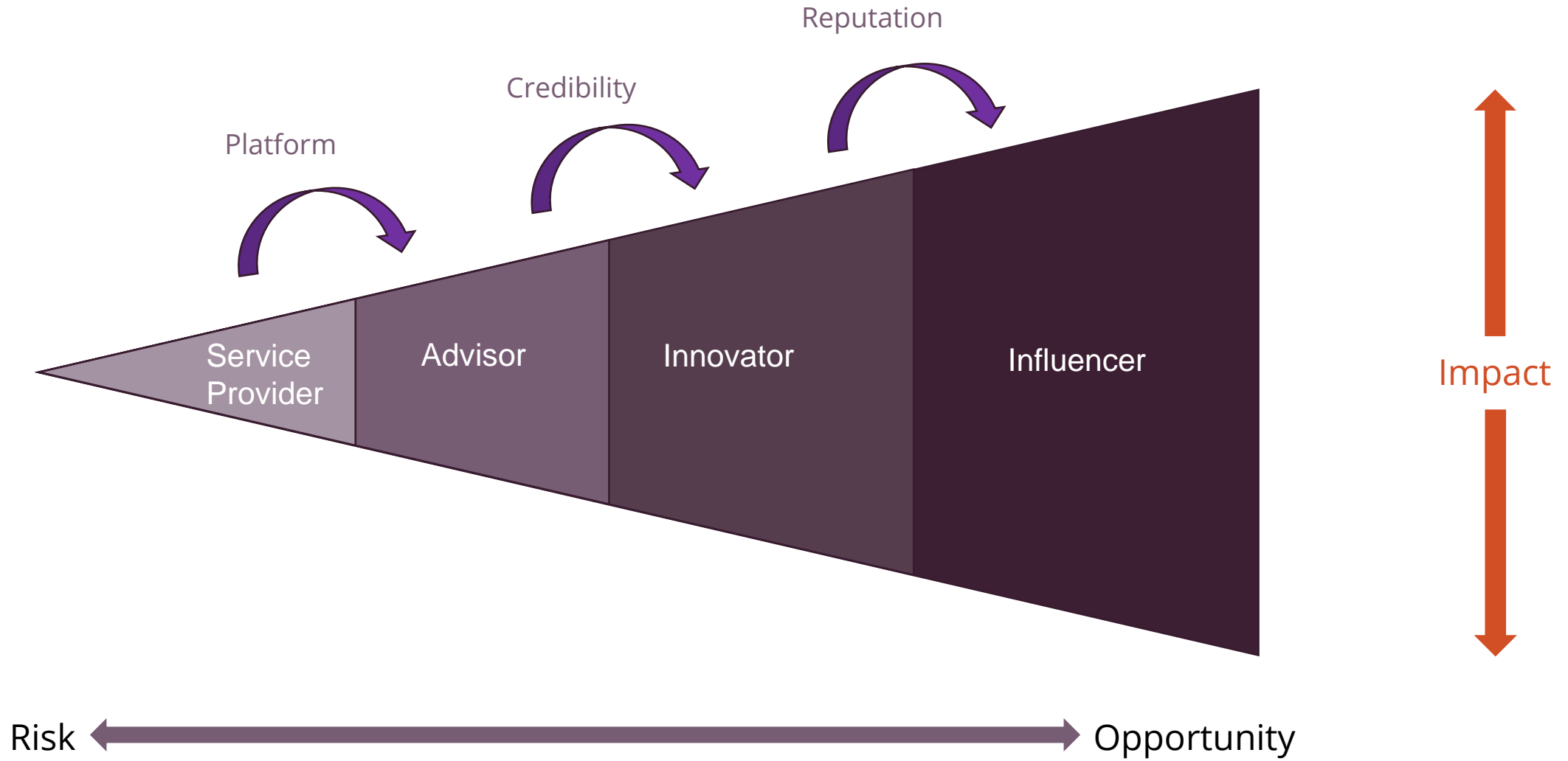
To accelerate progress in society towards a fair and sustainable future for all

Context



- We now have new challenges and choices
- We must grow sustainable impact
- We must enable philanthropy, build charity resilience and extend international reach

Roles



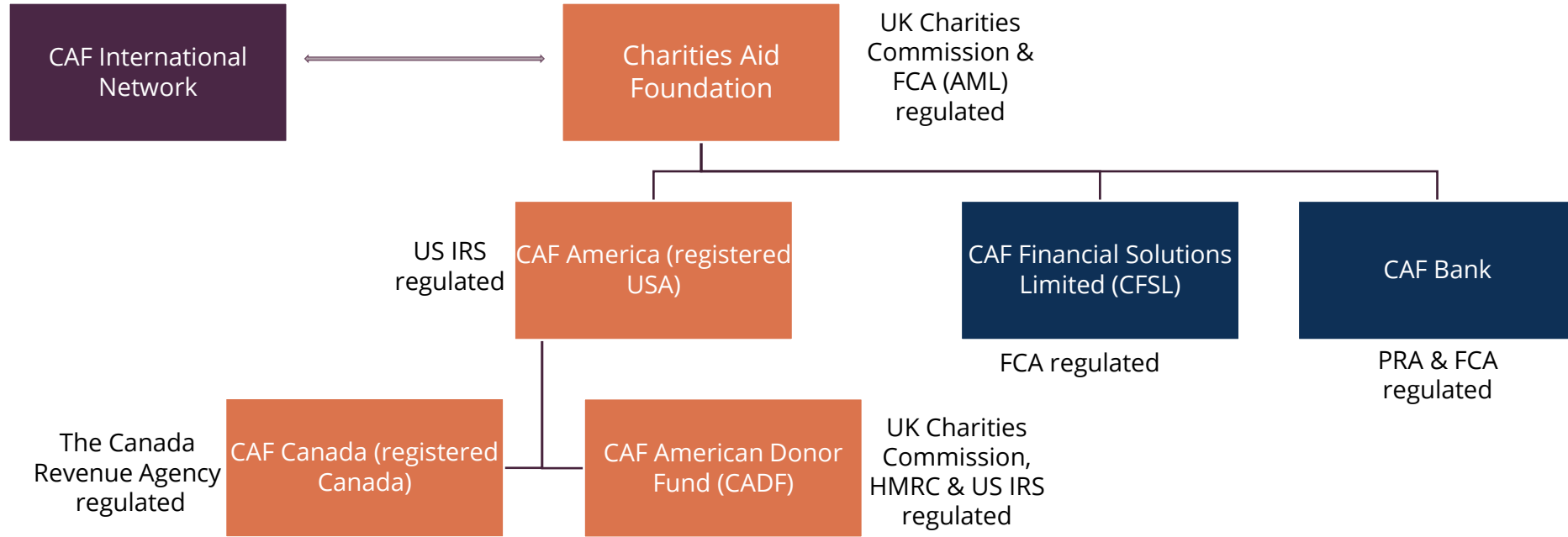
Beliefs

- Population level outcomes result from a complex ecosystem
- Without ecosystem change, interventions fail to make a lasting difference
- Scalable interventions require mainstream adoption
- Social movements are key to progressive societal change
- Ecosystem stewardship is needed
- CAF provides stewardship in selected areas

Together Building Opportunity

PURPOSE	To accelerate progress in society towards a fair and sustainable future for all					
PROPOSITION	We provide the global connections, infrastructure and vital resources to power social progress					
2030 VISION	A global digitally-enabled platform for giving, connecting people to accelerate social progress					
PHASE	 FIX THE BASE 2021-2023		 BEGIN TO GROW 2023-2025		 SCALE IMPACT 2025 - 2030	
ROLES	SERVICE PROVIDER		ADVISOR		INNOVATOR	INFLUENCER
ACTION	We partner with donors to realise greater impact through their giving		We enable charities to do more life-changing work with lasting benefits for all		We collaborate across sectors and borders to inspire innovation so civil society can thrive	
DRIVERS	Be Audience Centric	Simplify Service Excellence	Accelerate Data Innovation	Build Winning Team	Optimise Business Model	Grow Sustainable Impact
VALUES	Act with integrity		Move forward together		Shape the change	

Entities



- A consolidated group of UK and North American charitable and corporate entities
- Two 100% owned for-profit, mixed-motive, trading subsidiaries
- An international membership network of like-minded independent charities

Structure

Giving and Impact

CAF America
and CAF Canada

CAF Bank
And CAF Financial
Solutions Ltd

Group Services
Marketing, Operations,
People, Finance

- We partner with donors to realise greater impact through their giving
- We enable charities to do more life-changing work with lasting benefits for all
- We collaborate across sectors and borders to inspire innovation so civil society can thrive

Regulators

UK

CAF charity is regulated by the Charity Commission and registered with the Financial Conduct Authority for anti-money laundering.

CAF Bank is regulated by the Financial Conduct Authority (FCA) and the Prudential Regulation Authority (PRA).

CAF Financial Solutions is regulated by the FCA.

North America

CAF America is regulated by the US Internal Revenue Service and also complies with State regulations for registered charities and data privacy protections.

CAF Canada is regulated by the Canadian Revenue Agency and complies with provincial regulations in the provinces where it is registered.

- We adhere to UK, US and EU financial sanctions obligations defined by the Office of Financial Sanctions Implementation and The Office of Foreign Assets Control of the US Treasury Department.
- CAF complies with local regulation and legislation in any Network country in partnership with its local member.

Charity Commission

- Independent, non-ministerial government department accountable to Parliament with Charities Act powers.
 - Registered charities must prove charitable purpose for public benefit, and sound governance for tax exemptions.
- The CC:



Maintains a register of 180,000 approved organisations



Takes enforcement action when there is malpractice or misconduct



ensures charities meet legal standards including providing annual reports



makes information about charities publicly available



provides guidance and online services to help charities run effectively

Partners

We work with an ecosystem of partners to advocate for cross-border giving and grow our sustainable impact.

CAF Network

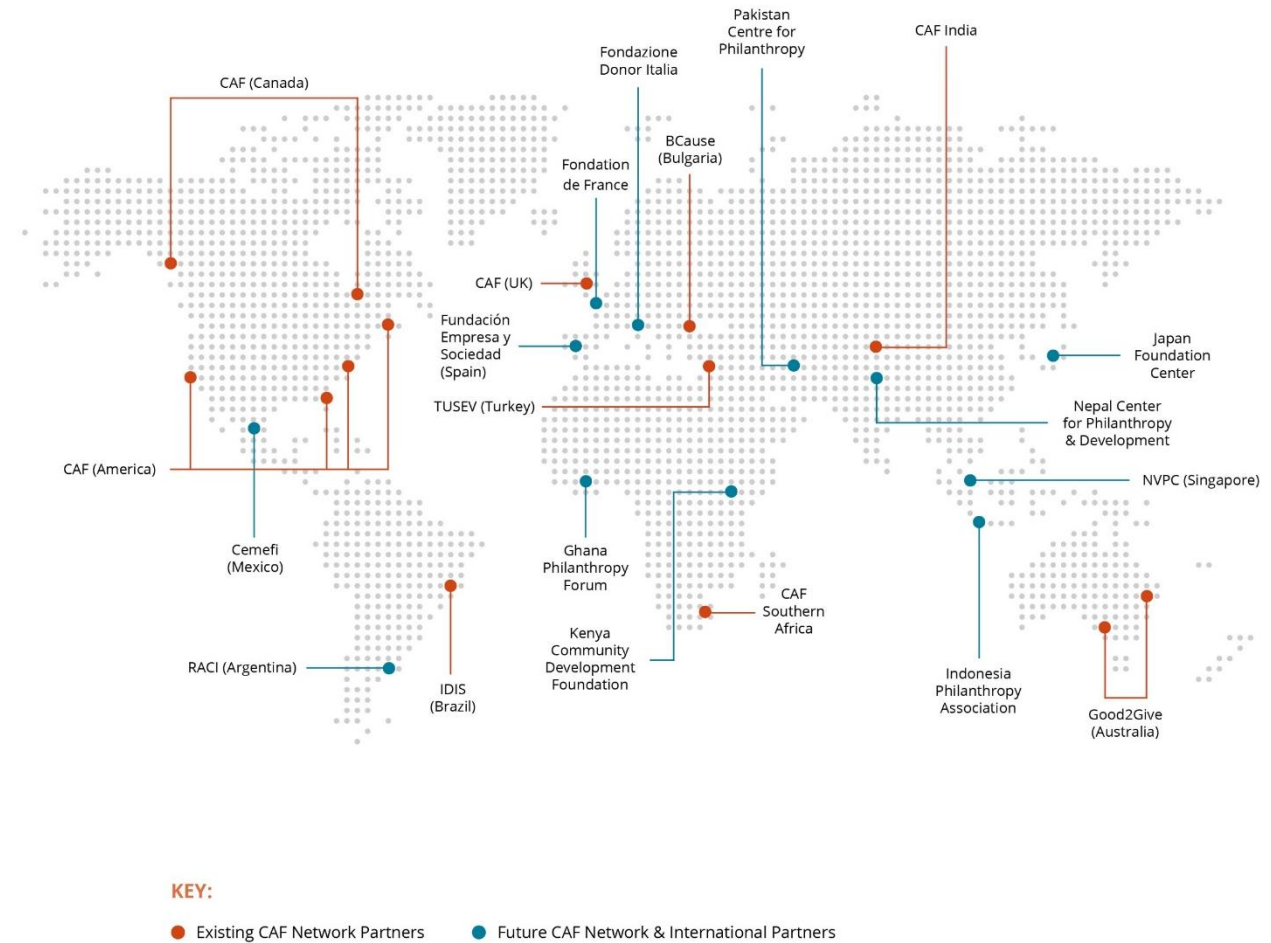
We partner with independent charities to increase the impact of international donations. Countries within the Network are identified based on where our donors give and where there is greatest need.

Membership Bodies

We collaborate with membership bodies to extend our international reach and enable safe and effective cross-border giving.

TGE Network

We co-founded Transnational Giving Europe to facilitate secure donations into and across 21 countries in Europe.



Principles

Borderless Giving

Common “Gold” standard
non-profit validation and
donation distribution

Localisation

Funds granted directly to
charities guided by local
insight



Enabling Philanthropy

Giving and Impact Services

Mark Greer, Managing Director

Agenda

- UK giving landscape
- Giving and Impact Services
 - Private Clients
 - CAF American Donor Fund
 - Corporate Clients
 - Impact Accelerator

An aerial photograph of a city, likely London, showing a mix of historic and modern architecture. A prominent feature is a tall, white, conical spire (St. Martin-in-the-Fields) in the foreground. The background shows a dense urban landscape with various buildings, including a modern glass-fronted building. The sky is clear and blue.

Tax deductible giving in the UK

- Income tax relief (charitable deduction) can be obtained at full rate (100%) when donation is made to a UK Registered Charity.
- Additionally, UK Gift-Aid increases value of gift to the charity by 25%
- Capital Gains Tax relief on gifts of shares and other assets, gifts of shares also attract income tax relief
- Inheritance tax reduces from 40% to 36% if 10% of estate left to charity
- Tax relief on cross-border donations is permitted



Charitable giving in the UK

giftaid it

25% government match on donations to UK charities

Cash donations

Higher rate (40% and 45%) taxpayers claim back the difference between their tax rate and the basic tax rate on the value of their donations

45% taxpayer giving £100,000

- Charity receives £125,000
- Taxpayer claims back £31,250
- Net **cost to donor** £68,750

Organisations like CAF can help donors use Gift Aid for donations to non-UK charities

Giving and Impact Services

3,103



PRIVATE
CLIENTS

£507m



CONTRIBUTIONS

55,098



INDIVIDUAL
DONORS ACCOUNTS

2,307



CORPORATE
DONORS

68 FTE



FRONT &
MIDDLE
OFFICE

£429m



GRANTS -OUT

£1.4bn



AUM

110



SOCIAL INVESTMENT
LOANS

1,667



GRANTS TO CHARITIES IN
90 COUNTRIES

100,000



GAYE DIRECT
DONORS

Giving and Impact Services

- LARGEST DAF OUTSIDE OF NORTH AMERICA
- ORIGINAL AND MARKET LEADING DUAL QUALIFIED DAF
- ORIGINAL PAYROLL GIVING AGENCY WITH 50% MARKET SHARE
- CURRENTLY WORKING WITH ~55% OF THE FTSE 100
- PIONEER OF SOCIAL INVESTMENT

Giving and Impact Services

Donors

Private clients
Corporate clients
CADF
CharityAccount

Meeting place in the middle

Grant making
Social investment
Advisory
Impact Investing
Charity Search
CAF Donate

Charities

Dashboard
Global Charity Database
Payments
Verification

Two main philanthropic options

Establishing
independent
registered
foundation

If the donor does not want to deal with liabilities, Trustees, reporting, legal, audits etc. then...

Establishing a Donor
Advised Fund (DAF)

...a donor advised fund is a simple, cost effective, tax effective, admin free, anonymous giving option.



Donor Advised Funds

A donor advised fund (DAF) is a vehicle for charitable giving

- The donor sets up a fund/account with CAF
- They then make donations into their fund
- Money can sit in the fund, and potentially grow
- The donor then suggests gifts from their fund to charities
- CAF undertakes all compliance and takes the risk away from the donor



Private Clients – What we do



How does the CAF Charitable Trust work?



Gift

Clients can gift various assets into our donor advised funds.

- Cash (GBP, EUR, USD) NB offshore (Jersey) account available for UK resident non-doms or other international clients
- Shares (permitted public shares may be held, whilst non-permitted shares can be gifted and then liquidated)
- Non-cash assets such as art or property

All gifts are an irrevocable charitable donation and full legal and beneficial title passes to CAF.

CAF will issue a UK charity tax exemption receipt for the value of all gifts once accepted and cleared to the client's account.



Grow

Clients can request investment of the assets in a DAF for the long-term.

See Investment Management Options section 2.1:

- Third-party DFM segregated portfolios (for investible philanthropic portfolios of £1m+)
- A broad range of publicly traded equities, bonds and funds (for investible philanthropic portfolios under £1m+)
- Social/Impact investment – see Useful Information section



Grant

Clients can request distribution of funds to charitable organisations and initiatives anywhere in the world and via a range of financial structures from one-off grants to structured loans.

CAF's specialist charity verification team undertakes due diligence on any requested charities, social enterprises and charitable projects on a local and global scale, ensuring that our clients' assets are deployed and protected for its intended purpose.

CAF's in-house legal team can negotiate and draft legal agreements where required to underpin complex forms of giving; e.g. Loans, match-funding pledges or other instruments.

FEATURES AND BENEFITS OF CAF CHARITABLE TRUST (DAF):

- Ring-fenced money for long or short-term charitable giving
- Estate planning that can be modified without extensive legal fees
- Flexible gifting options
- Tax efficiency
- The ability to name a fund or stay anonymous on a grant-by-grant basis
- Ease of reviewing giving history and investments within one trust account
- The freedom to give to charities across the world from one vehicle without time constraints, with the responsibility for due diligence handled by the DAF provider
- Family to be involved and planning for your clients' giving to continue beyond their lifetime
- Additional advisory and strategic support to help your clients have more impact and achieve their philanthropic goals

CAF Charitable Trust dashboard

CAF A & AW Charitable Trust My account Log out

A & AW Charitable Trust
Trust number: 87786 (Premier Service)

MANAGE MY TRUST

Your Private Client Manager is here to help you get the most from your giving.

Anna Fraser
Private Client Manager
T: +44 (0) 3000 123013
E: A.Fraser@cafonline.org

Trust overview

- Overall valuation: **£544,053.59** [Account summary >](#)
- Quarterly statements [>](#)
- View my Trust's transactions [>](#)
- Total cash: **£16,517.23** [Top up now >](#)
- Total investments: **£527,536.36** [View investments >](#)

Note: cash figures correct as of close of business on the previous UK working day.

How much have I donated?

Total Donated: £2,208

- P J CAT RESCUE: **£1,200** [Donate again >](#)
- Dogs Trust - West Calder

- Transactions**
 - Account summary [>](#)
 - Quarterly statements [>](#)
 - View my Trust's transactions [>](#)
- Top up my Trust**
 - Top up my Trust [>](#)
- Donations**
 - My Trust's donations [>](#)
 - Make a new donation [>](#)
 - Make an overseas donation [>](#)
 - Manage my Trust's regular donations [>](#)
 - Set up a new regular donation [>](#)
 - Share giving [>](#)
 - Leave a legacy [>](#)
- Trust investments**
 - View my Trust's investments [>](#)
 - Make an investment request [>](#)
 - Investment request mandate form [>](#)
 - Investment policy outlined [>](#)
 - Investment brochure [>](#)
- Profile settings**
 - Update my profile [>](#)
 - Change my password [>](#)
 - Personal gift aid declaration [>](#)

CAF A & AW Charitable Trust My account Log out

MY TRUST'S TRANSACTIONS

Look up your transactions using the date range or select 'Show more advanced features' to look up by currency or transaction type. Please note that recent transactions and some overseas donations may not be shown until processed.

Available cash: **£6,720.92** [New donation](#) [Top up now](#)

Available cash is your combined Income Account and Cash Deposit Account total. See the Account Summary page for further information.

From: To:

Filter by currency: [All](#) [GBP £](#) [USD \\$](#) [EUR €](#)

Filter by transaction type: [All transactions](#)

[Apply filters](#) [Reset filters](#)

[Download transactions >](#)

Date	Type	Description	Debit	Credit
19 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 19.04.2022, A & AW Charitable Trust		£10.00
19 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 19.04.2022, A & AW Charitable Trust	£10.00	
19 Apr 2022	Donation	Regular Donation, Test, Dogs Trust	£10.00	
11 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 11.04.2022, A & AW Charitable Trust		£100.00
11 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 11.04.2022, A & AW Charitable Trust	£100.00	
11 Apr 2022	Donation	Regular Donation, P J CAT RESCUE	£100.00	
05 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 05.04.2022, A & AW Charitable Trust		£49.00
05 Apr 2022	Internal Transfer	Cash Deposit-Income transfer, PL 05.04.2022, A & AW Charitable Trust	£49.00	

CAF A & AW Charitable Trust My account Log out

ACCOUNT SUMMARY

Your Trust allows you to hold assets in a number of different ways. You can hold cash in different currencies, in interest bearing accounts or in the form of financial investments. You can see a breakdown of your current Trust holdings in the accounts shown below, together with the balances held.

Trust overview

- Overall valuation: **£544,053.59**
- Total cash: **£16,517.23**
- Total investments: **£527,536.36**

Hover over the help buttons to reveal the features and purpose of each type of account as well as the £ sterling conversion rate equivalent of any Euro or Dollar holdings. Non-cash figures correct as of close of business on the previous UK working day.

[Download Account Summary >](#)

Account type	Account number	£ Sterling	\$ US Dollar	€ Euro
Income Account	30167667 (£ Sterling)	£0.00	No account	No account
Available cash	76067956 (£ Sterling)	£1,770.00		
Cash Deposit Account	74000812086	£4,950.92		Accounts are not currently available in these currencies.
Interest bearing cash deposit				
Capital Account	64000812085	£9,781.31		
Cash awaiting settlement	64000918163	£15.00		
Cash total		£16,517.23		
Investments				Investments are not valued in these currencies.
Purchase cost		£30,456.24		
Investments gains & losses		£497,080.12		
Show purchase				
Investment total		£527,536.36		
Overall valuation		£544,053.59		

To determine the £ Sterling equivalent of your \$ US Dollar or Euro account holdings, hover over each ⓘ next to the top of the table.

Move money between Income and Cash Deposit Accounts

Move money into your Income Account to make a donation or into your Cash Deposit Account to earn interest. [View current trust interest rates](#)

[Move money](#)

Convert / top up Euro or Dollar Balances

Please send your requests by email, or contact us by phone during office hours (Monday Friday 9AM - 5PM)

T: 02000 123 614
E: privateclients@cafonline.org

Growing Impact

The DAF partner of choice to the UK's Elite Wealth Managers



BARCLAYS



abrdn

Julius Bär



Rathbones
Look forward



QUILTER CHEVIOT
INVESTMENT MANAGEMENT

OPTIONS FOR MANAGING YOUR INVESTMENTS

GROW: INVESTMENT OPTIONS	SELF ADVISED	SELF ADVISED WITH AN AUTHORISED ADVISER*	SEGREGATED PORTFOLIO
Who do we accept investment requests from?	<ul style="list-style-type: none"> Donors Authorised signatories 	<ul style="list-style-type: none"> Donors Authorised signatories Authorised advisers <p>* see relationship structure below</p>	CAF establishes account with the Donor's preferred Investment Manager from CAF's panel of approved partners
How do we process transactions?	Via CAF's broker trading account	Via CAF's broker trading account	All trades managed by Investment Manager under the terms of a Discretionary Investment Mandate
What limits or restrictions apply?	As per investment options outline below	As per investment options outline below	Minimum £1 million

The Guide to Giving

Realise greater impact through your giving

1.0

BUILDING THE FOUNDATIONS OF YOUR GIVING STRATEGY

Why are you giving and what do you want to get out of it?

How to identify the problems you care about and want your giving to address

How to research your cause area

How to think about your timeline for giving

Investing your philanthropic capital

2.0

FORMING THE BUILDING BLOCKS OF YOUR STRATEGY

What type of philanthropist are you?

Determining your attitude to philanthropic risk

Systems change versus direct intervention

Supporting community-led initiatives

Building a giving portfolio

Responding to humanitarian crises

3.0

IDENTIFYING YOUR PARTNERS

Evidence versus impact

What is evidence and where can you find it?

Is there ever a situation where using evidence is unhelpful?

4.0

REFINING YOUR LIST

Big versus small charities

Overhead costs

5.0

OTHER FACTORS TO CONSIDER

Philanthropic leverage

Involve your family in your giving

Beyond financial giving: how to give your time well

APPENDIX

Helpful definitions

The spectrum of impact



CAF American Donor Fund



CAF AMERICAN DONOR FUND
CELEBRATING 20 YEARS

The CAF American Donor Fund is a dual registered donor advised fund that allows clients to make donations to charities worldwide and receive tax relief in the US and UK





Corporate Clients

Overview

Market leading: Largest UK based provider of corporate and employee giving services

Scale: Over £150m in receipts across employee & corporate giving and £2.7m in fees in 2021/22



Personal service: 2,300+ Corporate Clients, o/w ~200 are managed by the client team

Strategic: 13 Impact consultancy projects delivered; £1.7m in receipts referred

How we support our clients

Employee Giving

- Give As You Earn is CAF's payroll giving product, launched in 1987
- CAF is the UK's largest Payroll Giving Agency, facilitating schemes for 2,300+ clients and nearly 150k employees that give ~£70m annually
- Difference uses of GAYE:
 - to support disaster relief,
 - sponsorship requests,
 - to contribute to an EAP,
 - to directly support a charity/ies every month,
 - to donate their bonus tax effectively

Corporate Giving

- CAF works with ~200 clients across all sectors on their corporate giving programmes
- The main vehicle is the Company Account where clients house their philanthropic budget
- Our advisors support with:
 - Housing a foundation at CAF
 - Tax-efficient international donations
 - Fines, levies, dormant assets
 - End-to-end grant-making
 - Employee/consumer fundraising
 - Matching programmes
 - Grant agreements

Impact Advisory

- CAF's Impact Advisory service helps corporates conceive, develop and implement their strategic giving programmes
- Impact Advisors' expertise ranges from charity search & select, to strategy development and internal business case building, so is suited to clients at all stages of their philanthropy journey
- Clients often use CAF's giving infrastructure (GAYE / Company Account) but others only require advisory support

A woman with brown hair pulled back, wearing a white long-sleeved shirt with a pearl earring and a necklace, is smiling and looking to the right. Her hands are clasped near her chin. The background is a blurred office setting with a plant. A dark green rectangular overlay is positioned on the left side of the image, containing the text 'Impact Accelerator' in white.

Impact Accelerator

Impact Accelerator

CAF's theory of change: how we accelerate progress in society towards a fair and sustainable future for all

Grant making

- Working with the three primary audiences (HNW, corporate, public sector)
- Deploying our discretionary funds in line with our ToC

Social investment

- Working with the three primary audiences (HNW, corporate, public sector)
- Deploying our discretionary funds in line with our ToC

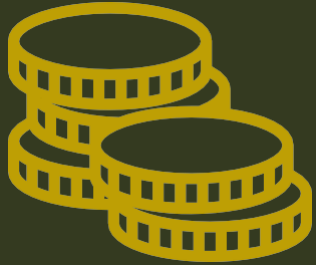
Advisory

- Working with the three primary audiences (HNW, corporate, public sector)
- Advice underpinned by our own ToC
- Advice enhanced by the examples from our own discretionary funds
- Potential for co-funding opportunities
- Consolidation = scalability

Impact Accelerator is where clients go when they want to take their impact to the next level

Social Investment

Since 2002



42 blended finance grants (since 2020) totalling £1m.

Currently managing £15m + in philanthropic capital.

Supported 530 charities, social enterprises and community groups.



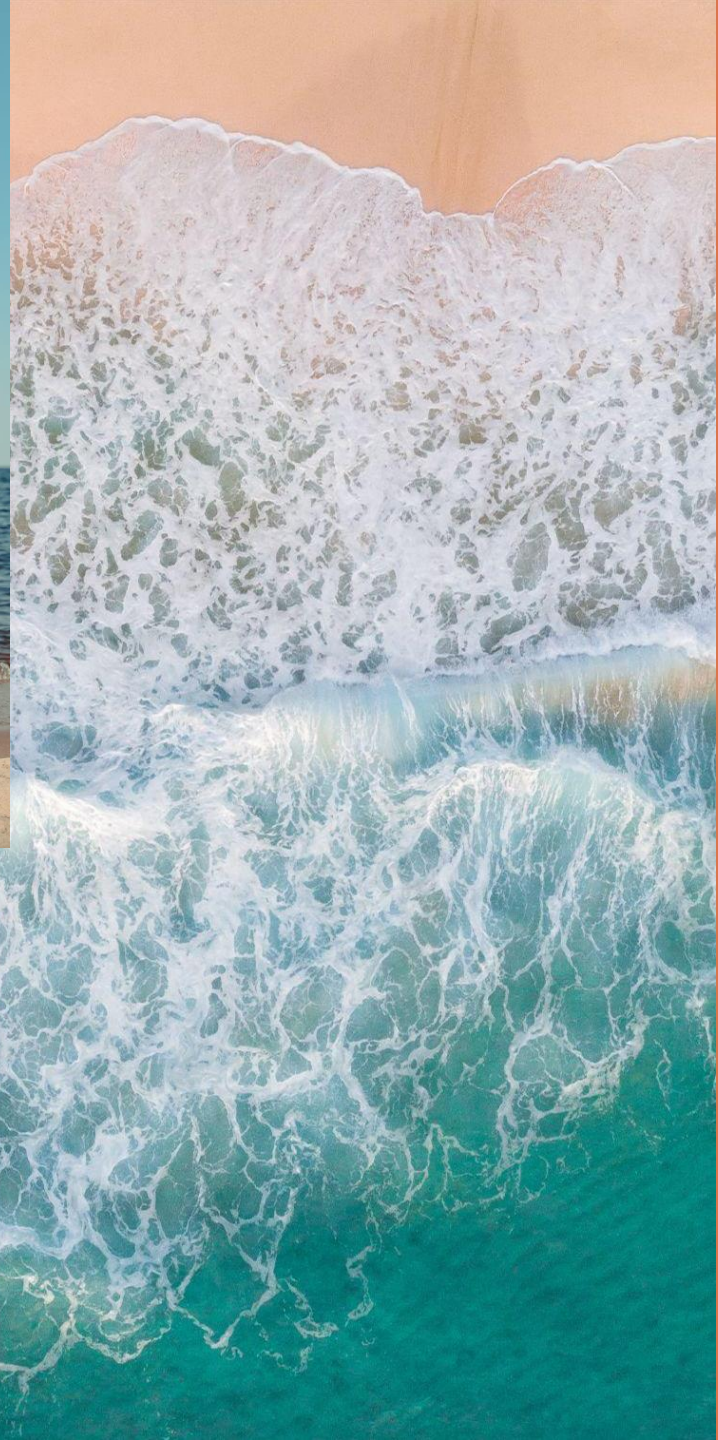
708 loans (mostly unsecured), standby facilities, quasi-equity and social impact bonds totalling £62m



Recognised as the most active social investor* in our area of the social investment market (lending £25k - £400k).

* Latest Big Society Capital data to end 2020





Introduction to CAF America and CAF Canada

Ted Hart, President & CEO
Jessie Krafft, SVP External Affairs
Brooks Reed, VP Thought Leadership & Philanthropy

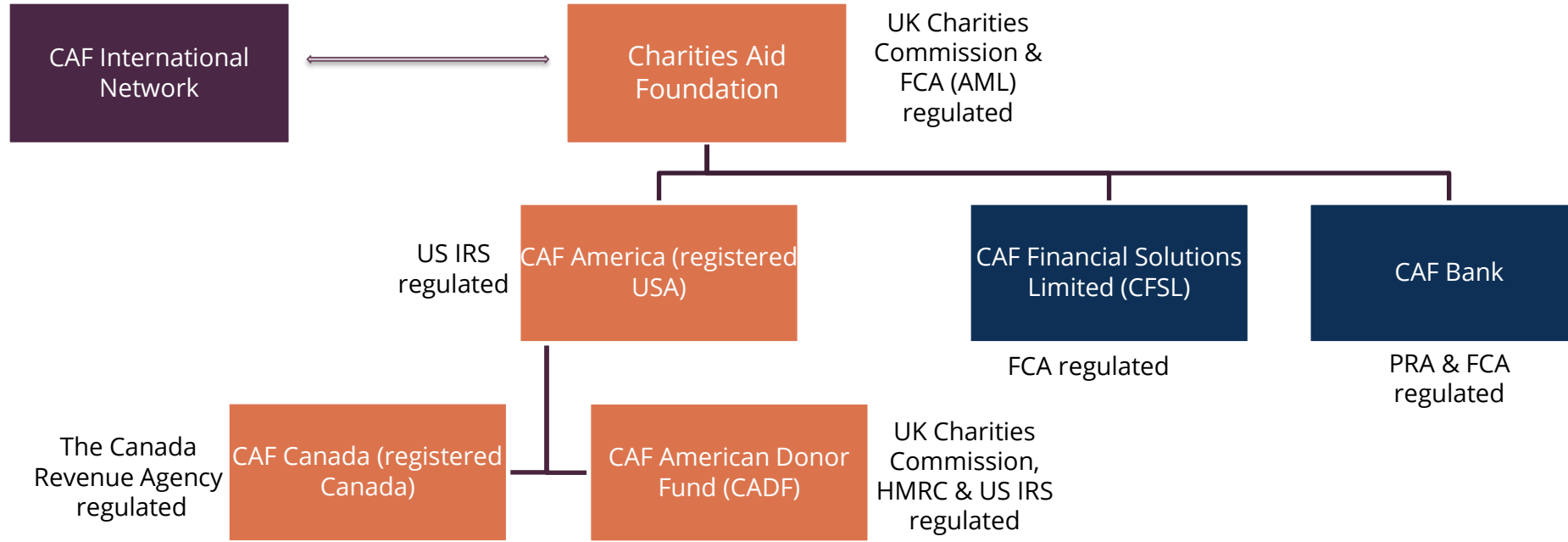




Agenda

1. About CAF America & CAF Canada
2. Our Framework for Due Diligence
3. Charity Validation
4. How to become Eligible to receive Funds
5. Charity Validation Badge
6. Expedited Grantmaking
7. Grantmaking Oversight and Responsibility
8. Site visits

ENTITIES



- A consolidated group of UK and North American charitable and corporate entities
- Two 100% owned for-profit, mixed-motive, trading subsidiaries
- An international membership network of like-minded independent charities

About CAF America

CAF America streamlines global and local donations for individuals, foundations, and corporations, **reducing risk, burden & boosting impact.**

CAF America (Charities Aid Foundation America) is a **US public charity.**

About CAF Canada

CAF Canada boosts giving, making it easy for Canadians to donate globally & locally.

Canadians can now make a lasting, positive impact worldwide!

CAF Canada is a **registered Canadian charity.**

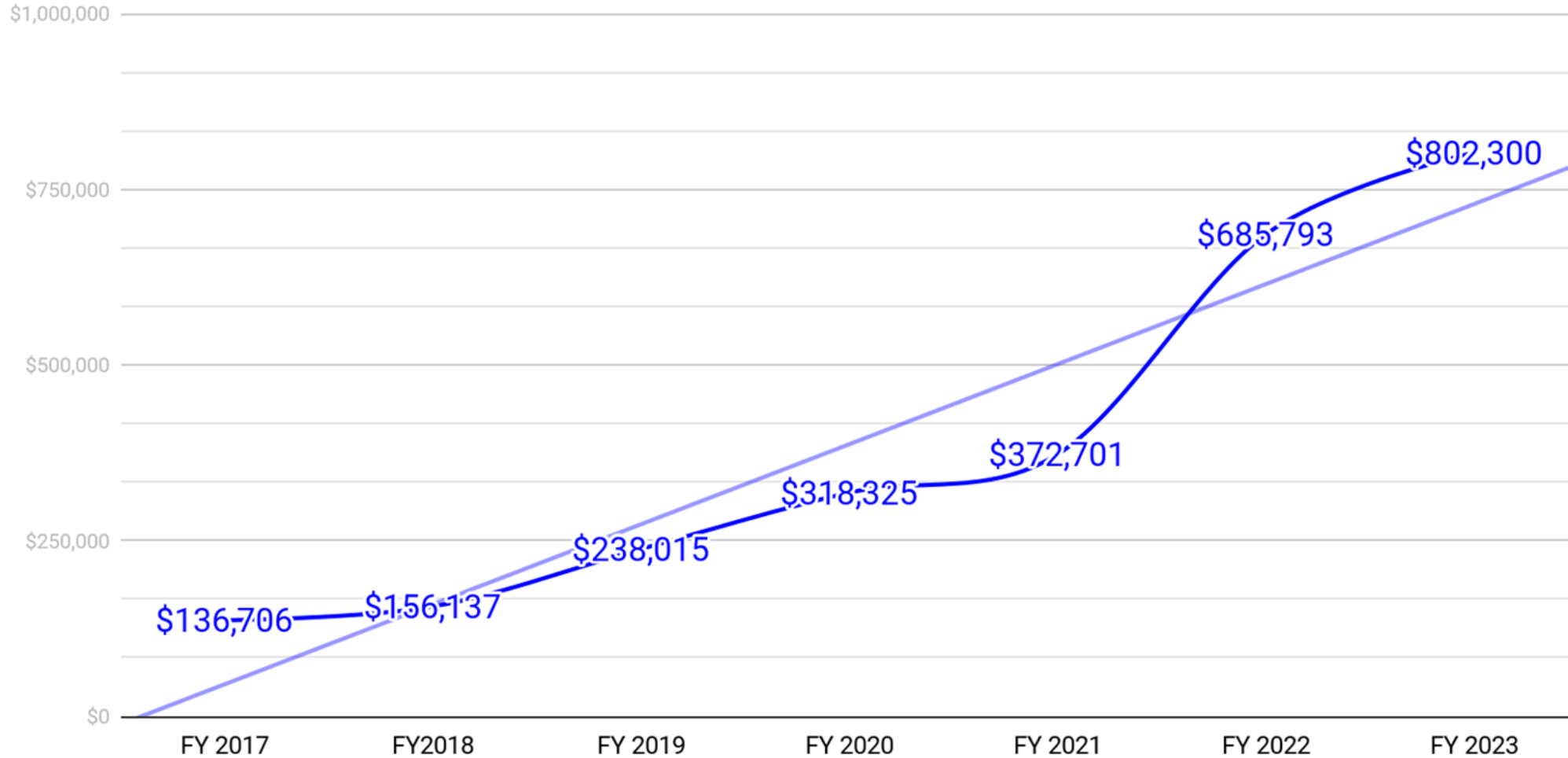
About CADF

The CAF American Donor Fund (CADF) enables dual taxpayers, filing tax returns in the UK and the US, to make tax-effective charitable donations. CADF is both a US registered charity (CAF America) and a UK charity, able to tax receipt for both governments.

GROWTH OF CAF AMERICA

(CAF America, CAF Canada, CADF) 2017 - 2023 (millions USD)

In USD (000's omitted)



FRAMEWORK FOR CHARITY DUE DILIGENCE

CAF America is a trusted partner for international philanthropy. Donors can give anywhere safely thanks to our commitment to the three principles of cross-border grantmaking:

Our Services and Support Guarantee

- Regulatory Compliance
- Risk Management
- Reputation Protection



CAF AMERICA'S GLOBAL IMPACT



\$4.6b

total granted



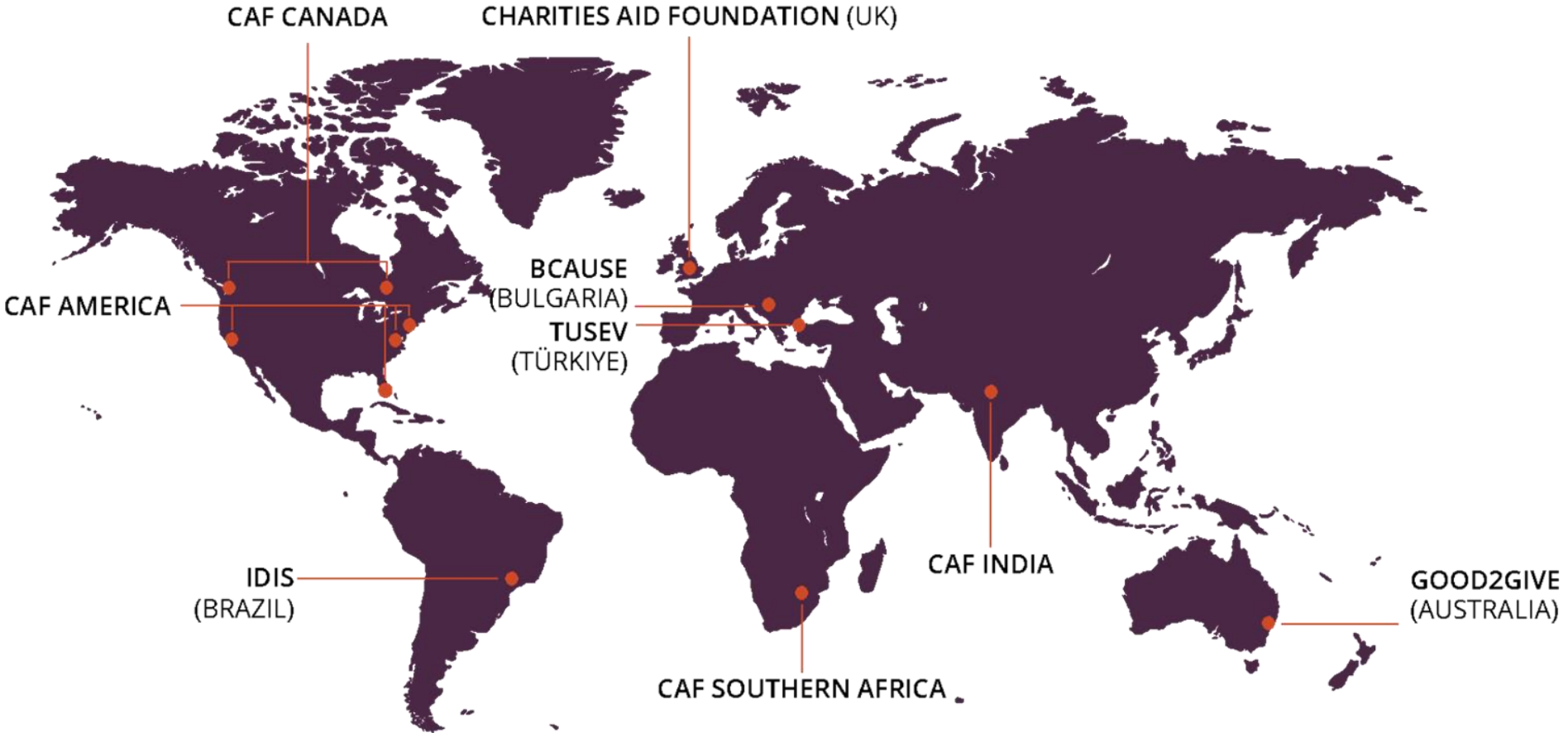
135

countries



1.8m

eligible organizations



CAF AMERICA PROGRAMS AND SERVICES



Donor Advised Funds

DAFs have become the most sought-after way for donors to manage and achieve their philanthropic goals.



Donor Advised Gifts

Donor Advised Gifts (DAGs) are the perfect solution for U.S. donors who want to give globally without establishing a Fund at CAF



Expedited Giving

Expedited grants can be made to charities that are eligible within CAF America's global database.



Friends Funds

A CAF America Friends Fund is an exciting, cost-effective alternative for foreign NGOs seeking to improve their support from US donors.



Validation Services

As the leader in cross-border giving, CAF America's due diligence processes ensure that the beneficiaries of your



CAF American Donor Fund

CAF and CAF America have joined together to offer a giving solution exclusively for individuals paying tax in both the US

DONOR ADVISED & RESTRICTED GRANTS

CAF America and CAF Canada ensure charities and donors are supported through every step of the giving process.

1

Donor makes donation to CAF America or CAF Canada advising funding to a charity, charity project, or fund.

2

Charity completes CAF America or CAF Canada vetting process.

3

CAF America or CAF Canada processes contribution & issues a donation receipt to donor once the distribution has been paid.

4

CAF America or CAF Canada reviews/approves grant recommendation and makes advised grant to charity - charity is alerted via payment letter and confirms receipt of funds.

CHARITY VERIFICATION BADGE

(CAF America and CAF Canada)



CAF AMERICA'S EXPEDITED GRANTMAKING

What is expedited grantmaking?

Our expedited grantmaking programs provide immediate access for US donors to quickly support charitable work utilizing the extensive nonprofit networks of our global partners.

Step-by-Step: The Expedited Grant Process



Donation

A US donor makes a gift to CAF America, advising a grant to a foreign charity.



Processing

CAF America processes the gift and provides the donor with a US tax receipt.



Transfer

CAF America sends the funds to a grantmaking partner for disbursement.



Payment

Grant is distributed domestically to the charity through the grantmaking partner.

CURRENT EXPEDITED GRANTMAKING PARTNERS



OUTFLOW: CONTEXT FOR CROSS-BORDER GIVING

United States

- Expenditure Responsibility for funding charitable programs via a grant agreement.
- Equivalency Determination for funding charitable organizations, allows for unrestricted grants and capital expenditures.

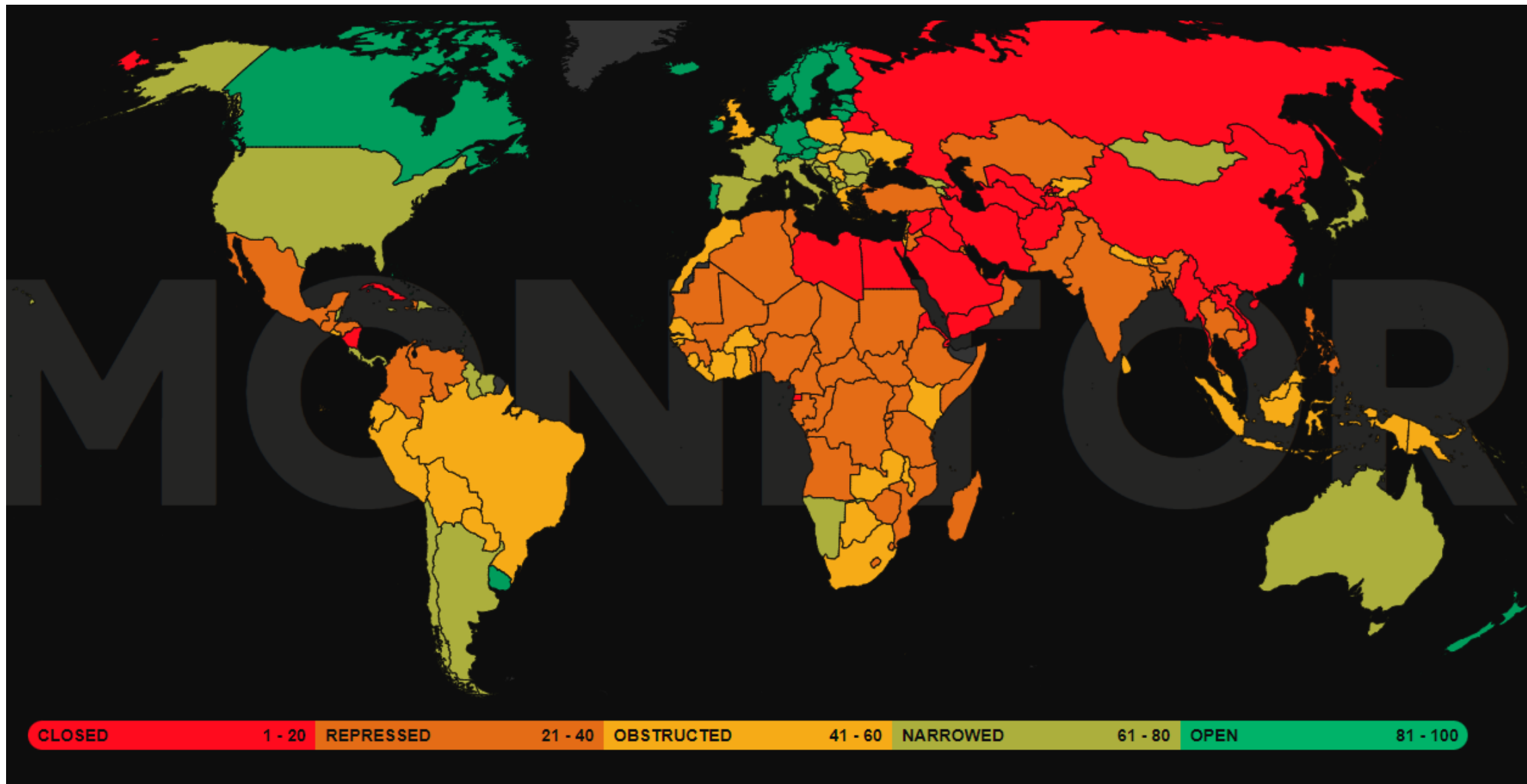
Canada

- International Project Funding via a Project Agreement to fund charitable projects owned and solely funded by the Canadian donor organization.
- Funds must:
 - Go towards the advancement of the charitable objects of the funder
 - Support a complete and exclusive charitable project

United Kingdom

- Cross-border grants may only fund projects that are considered charitable.
- Grantees must be reevaluated for eligibility at least annually

INFLOW REQUIREMENTS: LOCAL COUNTRY CONSIDERATIONS



HOW WE HOLD CHARITIES ACCOUNTABLE

All CAF America cross-border grants are made after executing a grant agreement. We use the following tools and strategies to hold our grantees accountable:

- For most grants we require **annual reporting** on the use of our grant funds.
- We conduct **Site Visits** to ensure that work is progressing as intended.
- If we suspect that a grantee has acted incorrectly, we will investigate as needed and, when applicable, pursue legal action.

Our risk-based approach is designed to minimize the risk in our grantmaking portfolio, and we aim to only use these tools when we absolutely need to.

CAF AMERICA'S SITE VISIT PROGRAM

From time to time, CAF America will travel to conduct a Site Visit with our charity partners. Our Site Visit Program has three primary objectives:

1. Site Visits advance our Risk and Compliance priorities by resolving specific, intentional oversight questions.
2. Site Visits support the development and reinforcement of CAF America's understanding of the charities we validate, as a critical resource we can draw on for philanthropic services.
3. Site Visits strengthen connections between our donors and the charities they advise grants to, making their philanthropic partnerships with CAF America more meaningful.



CAF AMERICA & CAF CANADA THOUGHT LEADERSHIP

CAF America & CAF Canada maintain a Thought Leadership program to educate our donor clients and charity partners about how international grantmaking and cross-border funding works from the US and Canada. We partner with external experts, highlight internal voices, and collaborate with the

Level	Types of Content
BASIC	<ul style="list-style-type: none">• News Alerts• Blog Posts• Stories of Impact• Case Studies
INTERMEDIATE	<ul style="list-style-type: none">• White Papers• Survey Reports• Webinar Series• Crisis & Funding Podcast
FLAGSHIP	<ul style="list-style-type: none">• Conferences/Symposiums• Major Reports (COVID Series)

CAF America & CAF Canada Thought Leadership (Examples)

OFAC Issues General Licenses for Humanitarian Activities in Sudan

Welcoming Ukrainian Refugees in Bulgaria



Published on June 14, 2022

Closing the Entrepreneurship Gender Gap

By: Mikenzie Penn, Nick Harvey



WHEN THE GIVING GETS TOUGH:

Navigating Risk in Sanctioned Locations

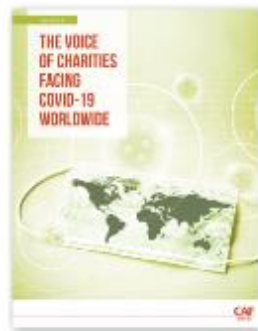
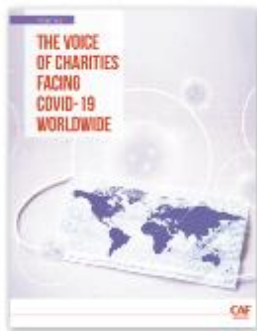
Understanding the CRA Guidance on Grants to Non-Qualified Donees

Building the Future

ADVISING LATIN AMERICAN PHILANTHROPY FROM MIAMI



India Announces Extension of FCRA Eligibility



Questions?





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