



Donor-Advised Grant Recommendation Guidelines

The Community Foundation will not make a grant that provides a financial or more than incidental benefit to a donor, a donor advisor, an advisory committee member or any person in whose honor a donor-advised fund is created or named, or a related party to any such person. The following chart provides general guidelines regarding grants that a donor may recommend or propose.

Proposed Grant Purpose	Can Be Recommended	CANNOT Be Recommended
Pledges, Pledge Drives	<ul style="list-style-type: none"> • Commitments that are not legally binding • Commitments that were legally binding as to the recipient of the charity but have been successfully dissolved • Expression of intent by the donor to recommend a grant 	<ul style="list-style-type: none"> • Pre-existing financial commitments that are legally binding
Events	<ul style="list-style-type: none"> • Purchase of tickets to or tables at event that donor is not attending • Support for charitable events designated 100% tax-deductible by the recipient charity • Support for charitable events if associated benefits are waived by donor 	<ul style="list-style-type: none"> • Purchase of tickets to charitable events that donor plans on attending, even if donor pays non-tax-deductible portion separately • Paying for sponsorship of an event at which donor plans to accept the associated benefits • Paying for an auction item at an event
Memberships	<ul style="list-style-type: none"> • Memberships at houses of worship that provide only intangible benefits • Annual memberships that provide only incidental benefits and are 100% deductible as stated by the recipient charity 	<ul style="list-style-type: none"> • Memberships where the donor has not waived all benefits
Scholarships	<ul style="list-style-type: none"> • Contributions to existing scholarship funds • Establishment of new scholarship fund at eligible educational institution or charitable organization (not another donor-advised fund) for which the donor may advise as to selection criteria and participate on the selection committee but may not have a majority or deciding vote on qualified applicants • Distributions can be made from a donor-advised fund to support a scholarship program 	<ul style="list-style-type: none"> • Scholarships for which the donor has the majority or deciding vote on qualified applicants • Scholarships for which the donor or a related party of the donor is a recipient
Individual Support	<ul style="list-style-type: none"> • Grants to qualified charities sponsoring missionary or religious work • Contributions toward a project or effort led by an individual that do not directly support that individual's salary 	<ul style="list-style-type: none"> • Grants to benefit designated individual(s), including hardship or disaster relief grants • Grants to pay a named person's salary • Support for the fundraising efforts of the donor for which the donor has made a fundraising commitment, such as an athletic event or race, unless the fundraising obligation has been satisfied in full
Lobbying, Political Contributions	<ul style="list-style-type: none"> • Grants to qualified charities that advocate on issues of public concern that support their charitable purpose 	<ul style="list-style-type: none"> • Grants to support a political campaign on behalf of or in opposition to any candidate for public office • Grants to organizations that conduct activities in direct support of or opposition to a specific piece of introduced legislation