




Calgary Foundation

Donors' Guide to Granting





The greatest reward of having a Donor Advised Fund at the Calgary Foundation is seeing it actively supporting organizations and causes that matter to you.

The Fund you have established can assist thousands of organizations. The Calgary Foundation can support all parts of the charitable sector, wherever your passion lies: from elevating the arts, to creating community connections, supporting lifelong learning, sustaining the environment, advancing wellness, enhancing living standards and ensuring thriving populations.

This Guide describes how you can make successful grant recommendations, outlines what you can expect from us along the way, and notes who to contact if you need help.

*Paintings by Calgary-based artist Amy Dryer
Front and inside cover: "A Sense Of"
Back cover: "Gather"*

Recommending grants

While, by law, the Calgary Foundation's Board of Directors retains final authority regarding the disbursement of all of our grants, your advice is vitally important to us.

Who can recommend grants?

Grant recommendations can be made by:

1. The Fund's Founder(s)
2. Designated Fund Contacts who may be any other individuals whom the Founders have authorized in writing to recommend grants, such as family members or personal representatives.

Fund Founders and Fund Contacts will be referred to collectively in this Guide as Fund Contacts.

Who can receive grants?

Under the *Income Tax Act*, the Calgary Foundation must grant to qualified donees for charitable purposes as defined by the Canada Revenue Agency.* Qualified donees are organizations that can issue official Canadian tax receipts for gifts. There are in excess of 86,000 qualified donees in Canada from which you can choose. If you are unsure if an organization is eligible for our support, please contact us.

Qualified donees primarily include:

- Registered Canadian charities
- Registered Canadian amateur athletic associations
- Certain universities outside of Canada
- Canadian municipal, provincial, territorial and federal governments

We are unable to support:

- sponsorships
- memberships
- unregistered nonprofit organizations
- international charities not registered in Canada
- unregistered sports groups and professional sport organizations
- individuals (with the exception of pre-established Calgary Foundation Student Awards)
- grants that privately benefit donors or anyone not at arm's length to donors (e.g. family, friends, business associates, etc.).

*Qualified donees:

cra-arc.gc.ca/chrts-gvng/chrts/plcy/cgd/qlfddns-eng.html

When can I recommend grants?

The Foundation's fiscal year runs from April 1 to March 31, and we generally process grants twice a month, all year long.

Donor Advised Flow Through Fund grants can be recommended throughout the year noting the December exception

Donor Advised Endowment Fund (DAEF) Grant Recommendation Process

April

The Calgary Foundation's accounting for the previous fiscal year is completed, after which we calculate the amounts available for DAEFs to grant in the new fiscal year.

May – June

We will send you confirmation of the amount available to grant for the fiscal year.

December

Grant recommendations for grantees needing funds before the end of the calendar year should be submitted by December 8.

February

DAEF grant recommendations for the fiscal year should be provided to us no later than **February 28** to ensure we have time to complete all grant processing before year end.

March

Grant processing is completed for the fiscal year. If grants are not recommended by a DAEF Fund Contact during any given fiscal year, or if only a portion of the available funds are used, any remaining balance will not be available to be carried forward for granting in a future year. The unused amount will remain in the balance of the Fund.

How much can I grant?

Donor Advised Endowment Funds

A percentage of each Endowment Fund's balance is available for distribution as grants each fiscal year. By federal law, all registered charities, including the Calgary Foundation, have a Disbursement Quota requiring them to distribute no less than 3.5% of their pooled assets annually.* At the end of each fiscal year, the Calgary Foundation's Board of Directors uses a formula for calculating our annual distributions that effectively accounts for market fluctuations over time, smoothing peaks and valleys in our distribution levels year after year. This helps to achieve our goal of giving as much as possible to the community each year while better preserving the value of our endowment over time. After this distribution rate has been affirmed and our year-end accounting is complete, we will determine what is available to grant from the Fund for the new fiscal year and notify you.

*Disbursement Quota: cra-arc.gc.ca/chrts-gvng/chrts/prtnng/spndng/menu-eng.html

Donor Advised Flow Through Funds

The full balance of the Fund can be granted at any time. If new gifts are made into the Fund, we typically ask that no more than 80 per cent of the Fund's balance subsequently be distributed for a period of approximately four to six weeks until we can properly account for the new gifts and any accompanying costs (e.g. cost recovery, credit card processing fees, brokerage commissions).

How can I maximize impact?

Some people like to recommend fewer grants to amplify the size and impact of each grant on a select number of organizations; others prefer to spread their support across many areas of the community. ***There is no right or wrong approach.*** However, to help ensure grantees receive valuable benefit while reducing proportionate processing costs for all concerned, we recommend grants of no less than \$250.

How can I recommend a grant?

DonorCentral[®] is a convenient and secure online tool that enables you to access fund information and make grant recommendations. Look for the DonorCentral icon on the home page of the Calgary Foundation's website: calgaryfoundation.org

If you require assistance navigating DonorCentral, see the *Using DonorCentral* guide on the Fund's homepage or contact our Information Officer (see end of Guide for contact information).

If you are unable to or prefer not to use DonorCentral, please contact one of our Donor Stewardship staff members (also listed at the end of this Guide).

Setting grants in motion

Calgary Foundation distributes grants near the middle and end of each month. In keeping with this schedule, we strive to process grant recommendations in a timely manner, typically within two to four weeks of receiving them.

Once we receive your grant recommendations, we will:

- 1 Review and approve**
We review the recommendations for the following: a) available fund balances, b) qualified donees, and c) charitable purposes. If these requirements are met, the recommendations are generally approved and move forward. If not, we will contact you.
- 2 Process and distribute**
Grant payments are issued electronically or mailed directly from our financial institution to grantees. Grantees will receive a grant letter from us advising them that they will be receiving the grant and providing details of how the grant is to be used and recognized. We always ask that the Fund's name and the Calgary Foundation be recognized together—unless anonymity is requested.
- 3 Post on DonorCentral**
Recommended grants can be viewed on DonorCentral once they have been approved and processed—usually within two to four weeks of submission.
- 4 Forward grant acknowledgements**
Thank you letters received from grantees will be forwarded to you within one to two months of our receipt. Additional mailings from grantees such as invitations and reports addressed to the Fund will also be sent to you. We generally do not forward solicitations or general mailings, such as newsletters.

Discovering what matters to you

We have a number of excellent ideas and resources available on our website to help you explore the causes and organizations that resonate with you. Please see *Donors' Guide to Granting* page under the Donors tab on our website.

If you prefer to receive a printed list of these resources, or would like to have a conversation with one of our staff members, please let us know. If you are approaching philanthropy as a family or group, please see helpful references on our website's *Family Philanthropy* page under the tab for Donors.

Visit the Community Knowledge Centre (CKC) to learn about charitable organizations doing great work in the community.



Community
Knowledge
Centre

ckc.calgaryfoundation.org

Working with us in the community

Donors who wish to leverage the impact of grants to the local causes or charities they are passionate about often choose to recommend grants that align with those being made by the Calgary Foundation through one or more of our granting programs, listed below:



Community Grants

Organizations spanning the charitable sector submit applications annually in spring and fall for these grants, which receive the review of our staff and volunteer committees. The grants promote a healthy, vibrant community that embraces diversity and supports all of its members. Recent grants are listed on our website and confidential lists of Community Grants applicants seeking funding during each granting cycle can be sent to you upon request.



Major & Signature Grants

These grants support transformational initiatives that seek to enrich people's lives, create innovative solutions for major issues, and ensure safe and vibrant communities in which everyone can thrive.



Neighbour Grants

These grants support small-scale, citizen-led projects that help people create and strengthen the ordinary bonds of neighbourliness and belonging.



Strategic Opportunity Grants

These grants support small to mid-sized Calgary and area charities with small, time-sensitive, strategic initiatives that either help charities with organizational transformation or the pursuit of a unique opportunity to advance their work.

Areas of interest

If you have a specific area of charitable interest, please let us know. We will keep your interest in mind as charities contact us with opportunities to support exciting initiatives.

Making multi-year or ongoing grants

Fund Contacts with endowed Donor Advised Funds might recommend that a portion or all of their yearly amount available to grant should go to a specific grantee or grantees for a defined number of years or indefinitely during their lifetime until further notice. These grants can be issued automatically on an annual basis with no need to provide a grant recommendation each year.

Fund Contacts should be cautioned, however, when relying on Donor Advised Endowment Fund dollars to fulfill commitments of fixed amounts in future years. Funds are subject to fluctuating values in the Endowment Portfolio and might not have stable amounts available to grant from year to year. Also, because these assets have been gifted to the Calgary Foundation, we must enter directly into a signed agreement with a grantee for commitments involving Calgary Foundation Funds; otherwise, Fund Contacts are personally responsible for ensuring their pledges are upheld.

As a result, we suggest that if you are considering making a multi-year commitment, please talk to us so we can help you plan.

Contacts:

Donor Stewardship

Each of our Fund Contacts has a Donor Stewardship staff member responsible for supporting their relationship with our Foundation.

Marie Stevens
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DonorCentral

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Information Officer
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General stewardship inquiries

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