

Donors' Guide to Granting

The greatest reward in having a Donor Advised Fund at Calgary Foundation is knowing you are making an impact on organizations and causes that matter to you.



Living Standards - Poverty Reduction



There are thousands of charitable organizations to which you can direct your support. We can help you channel and focus your passions.

This guide describes how and when you can make successful grant recommendations, outlines what you can expect from us along the way, and offers valuable resources to assist you in achieving your charitable goals.



Discovering what matters

You have access to excellent resources to help you explore the causes and organizations that resonate with you.

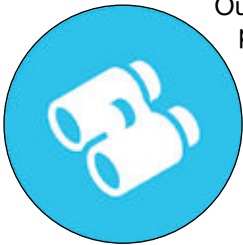
- **Talk to our knowledgeable staff**

A donor stewardship team member has been designated to assist you.



- **Explore DonorCentral**

Our online donor platform offers a host of resources and opportunities to provide charitable support.



- **Visit our website** for helpful publications and links.



- **Engage in multigenerational giving**

The Family Philanthropy page on our website explores how to approach philanthropy across generations.



- **Visit Calgary Foundation's Community Knowledge Centre**

Head to **ckc.calgaryfoundation.org** to discover the inspiring work of hundreds of charitable organizations.



- **Follow us on social media**

Receive updates on charitable activities and events in our community.



Recommending grants

DonorCentral® is your convenient, secure online tool to keep you connected to Fund activity, make grant recommendations, and access resources for support and inspiration.

Visit calgaryfoundation.org to access DonorCentral.

Require DonorCentral assistance?

Contact our Donor Grants Administrator:
donorgrants@calgaryfoundation.org
403-802-7304

If you would like to discuss alternative methods of providing grant recommendations, please contact your designated Fund Steward.

Who can recommend grants?

Grant recommendations can be made by:

1. Fund Founder(s)
2. Designated Fund Advisors (i.e. individuals authorized in writing by the Founders, such as Fund successor family members or personal representatives)

When can I recommend grants?

Anytime during the Foundation's fiscal year (April 1 to March 31). Grants are generally processed twice a month, all year long.

Donor Advised Flow Through Fund grants can be recommended throughout the year, noting the November 30 exception.*

Donor Advised Endowment Fund (DAEF) Grant Recommendation Process

April-May

Calgary Foundation calculates available amount to grant for the fiscal year and sends you confirmation of the spendable balance.

*November 30

Deadline for grant recommendations for funds to be disbursed before the end of the calendar year.

February 28

Deadline for DAEF grant recommendations for the fiscal year.

March

Grant processing is completed for the fiscal year. If grants are not recommended 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.

Who can receive grants?

Under the Income Tax Act, 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 more than 86,000 qualified donees in Canada from which you can choose, including:

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

How much can I grant?

To help ensure organizations receive valuable benefit, while reducing proportionate processing costs, we recommend grants of no less than \$250.

Donor Advised Endowment Funds

Like all registered charities, we are required by law to distribute **no less than 3.5%** of our pooled assets annually. At the end of each fiscal year, Calgary Foundation's Board of Directors determines the distribution rate for our Endowment Funds for the upcoming fiscal year, with the goal of maximizing what we give to the community while preserving the value of our endowment over time. After the distribution rate has been affirmed, we calculate the new fiscal year's spendable balance for each Fund and notify you shortly thereafter.

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 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 (i.e. cost recovery, credit card processing fees, brokerage commissions).

We are unable to support:

- Sponsorships
- Memberships
- Unregistered nonprofit organizations
- International charities not registered in Canada
- Unregistered sports groups and professional sports organizations
- Individuals (except for pre-established Calgary Foundation Student Awards)
- Grants that privately benefit donors or anyone not at arm's length to donors (i.e. family, friends, business associates)

Making multi-year or ongoing grants

Donor Advised Endowment Fund Advisors might recommend that a specific grantee(s) receive a grant for a defined number of years or indefinitely during their lifetime. These grants can be issued automatically on an annual basis, with no need to provide a grant recommendation each year.

Please note: Fund Advisors should be cautioned when relying on spendable 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. Because these assets have been gifted to Calgary Foundation, we must enter into signed agreements with grantees for commitments involving Calgary Foundation Funds; otherwise, Fund Advisors are personally responsible for ensuring their pledges are upheld.

Working with Calgary Foundation in the community

Donors who wish to leverage the impact of a grant often choose to recommend grants that align with those being made by Calgary Foundation through one or more of our granting programs. Confidential lists of organizations seeking funding through our Community Grants program will be provided to you in the spring and fall.

calgaryfoundation.org has details on our granting programs, including lists of recent grants.



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, within two to four weeks of receiving them.

1. Review and approve

Your recommendations are reviewed to ensure the following: a) available fund balances, b) qualified donee status with Canada Revenue Agency, and c) charitable purposes. If these requirements are not met, we will contact you.

2. Process and distribute

Grant payments are issued to grantees electronically or mailed directly from our financial institution. Grantees are notified of the grant and advised on how it is to be used and recognized. We ask that the Fund's name and 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.

We're here to help:

Donor Grants Administrator

403-802-7304

donorgrants@calgaryfoundation.org

Environment, Pursuing a
Sustainable future
trees recycling
planting composting
gardens solar
trees alternative energy
wind



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FOUNDATION**
FOR COMMUNITY, FOREVER

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