

**Donor Advised & Community Charitable Fund Grant Recommendation Form**

**1. FUND INFORMATION**

Fund Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. GRANT RECIPIENT**

Organization Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. GRANT AMOUNT & PURPOSE**

Grant Amount *(Please consider making grants of no less than $250):* $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purpose *(If other than general support):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. ACKNOWLEDGEMENT INFORMATION**

List Donor Name(s) As (*If different from standard listing; e.g., in memory or honor of someone or to celebrate a special occasion*):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Please make fund name anonymous  Please make donor name(s) anonymous

**5. CERTIFICATION**

I understand that this grant recommendation must be approved by the Governing Committee of the Licking County Foundation, which is guided by the governing documents and grantmaking policies of the Foundation; and that the entire process may take up to two weeks. I certify that this grant recommendation does not represent the payment of any financial obligation of mine *(i.e., pledge, membership or sponsorship)*; nor will I receive any tangible personal or professional benefit *(e.g., tickets, meals, preferred parking or seating, discounted merchandise or other preferential treatment)*, and adheres to the *Grant Restrictions* on the reverse of this page. *Please note that the Pension Protection Act of 2006 imposes penalties on donor advisors and foundation staff who do not follow these rules.*

Advisor Name (please print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Advisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**6. SUBMISSION & PROCESSING**

**Mail:** Licking County Foundation, PO Box 4212, Newark, OH 43058-4212

**Fax:** 740-322-6260 **Email:** jennie@thelcfoundation.org

Additional copies of this form can be downloaded at http://www.thelcfoundation.org/grants/dafunds/

**7. QUESTIONS**

Please contact 740-349-3863, x101 or jennie@thelcfoundation.org

**PLEASE SEE THE REVERSE SIDE FOR GRANT RESTRICTIONS AND PROCESSES**



**Donor Advised & Community Charitable Fund Grant Disbursement Process**

**1. GRANT REQUEST OR RECOMMENDATION FORM IS RECEIVED**

The appropriate form must be submitted by the fund advisor to begin the process. Forms can be found online at: <http://www.thelcfoundation.org/grants/dafunds/>. We encourage grant recommendations of no less than $250.

**2. CONFIRMATION OF GRANT AMOUNT AVAILABILITY & PURPOSE**

The Licking County Foundation reviews the Grant Recommendation Form to ensure the requested amount is available for disbursement and that the purpose of the grant is charitable, meets the purpose of the Fund, and that no *quid pro quo* benefit is associated with the grant.

**3. GRANT RESTRICTIONS**

Grants cannot be made from donor advised funds to private non-operating foundations, international organizations or to individuals. Grants cannot be made from donor advised funds for memberships, fulfillment of pledges, tickets to events, goods purchased at a charitable auction or other fundraising event, or anything else that benefits the donor. Grants cannot be made to fulfill a pledge of financial support that you (or your company) have made to an organization; or to support political campaigns or for lobbying purposes. Grants cannot be made for event sponsorship that includes tickets, advertising space, or other benefits to the sponsor; and for direct advertising for corporate donors or public officials. Donors, their advisors, and related parties may not receive grants, loans, compensation or similar payments (including expense reimbursements) from the donor advised funds. *Please note that the Pension Protection Act of 2006 imposes penalties on donor advisors and foundation staff who do not follow these rules.*

**4. GRANTEE’S ELIGIBILITY IS CONFIRMED**

The Licking County Foundation can, by law, only grant to qualified 501(c)3 charitable organizations and religious or governmental institutions and must confirm a recommended grant recipient’s IRS status ruling prior to disbursing a grant. You will be notified if an eligibility issue arises. There also may be a delay if the organization does not respond in a timely manner to information requests.

**5. COMMUNITY FOUNDATION BOARD APPROVAL**

It is the Foundation’s practice to generally follow the fund advisor’s recommendation. However, the final decision about all recommended grants rests with Foundation’s Governing Committee. Our board has fiduciary responsibility for, and final authority over, all grants made from every fund at the Foundation. All grant disbursements are reviewed and approved by the Governing Committee of the Licking County Foundation.

**6. GRANT DISBURSEMENT PROCESS**

The entire process, from receipt of your suggestion to mailing the approved grant will typically take about two weeks (longer if securities need to be sold).

**7. COMMUNICATION WITH GRANTEE**

Grant disbursements are sent directly to the organization with the source of the grant and any special designation indicated on the check. They also receive a letter with details on how the funds are allowed to be used and proper forms of recognition. Unless you request anonymity, the recipient charity will be informed of the name of the fund and the advisor. The fund advisor will receive confirmation from the Foundation of the grant disbursement.