

DONORS' GUIDE TO GRANTING



COMMUNITY VITALITY

is our purpose,
promise, and
passion.

Since 1955, The Calgary Foundation has been inspiring philanthropy by helping Calgarians invest in building a strong and resilient place to live, work, play and grow.

An overview of granting timelines, procedures and qualified donees so you know what to expect as you go through the granting process.

WHEN TO GRANT

Grant recommendations can be submitted at any time during our fiscal year between April 1st and February 28th.

Please note – during the month of March, we close our books and calculate year end Fund balances. Any amounts available to grant which were not granted from each Fund at that time are then added to the capital of the Fund.

We strongly recommend that you grant yearly to help ensure compliance with our Canada Revenue Agency disbursement quotas and to maximize your support for Canadian charities.

OUR CALENDAR

March 31
Year end Fund balances calculated

April
Amounts available to grant calculated as a percentage of Fund balance

May
Letters confirming amounts available to grant mailed to donors (Fund statements mailed separately)

February 28
Deadline for grants for current fiscal year

THE PERSON TO CONTACT

The Donor Grants Associate is the staff member responsible for facilitating grant recommendations and answering any questions regarding granting or your selection of charities.

DONOR GRANTS ASSOCIATE

Marie Stevens

403-802-7714 • donorgrants@thecalgaryfoundation.org

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WHO CAN RECEIVE GRANTS

SPRING AND FALL COMMUNITY GRANTS CYCLES

Twice yearly, The Calgary Foundation's (TCF's) Community Grants Program supports initiatives that respond to emerging community issues and evolving priorities. Donors are welcome to contribute to this program. If you wish to be notified about Spring and Fall Community Grants applications and/or might be interested in sitting in on committee meetings with applicants, please let our Donor Grants Associate know.

Additional funding from donors helps to ensure all deserving applications are supported, and your involvement is an unparalleled way of learning about charitable activity in Calgary!

The Calgary Foundation grants to all sectors of the community, including **Arts & Heritage, Community Development, Education & Lifelong Learning, Environment, Animal Welfare, Health, Human Services and Recreation.**

While we strive to fulfill the wishes of our donors, we also must ensure we are acting within the law as governed by the *Income Tax Act* and the requirements of the Canada Revenue Agency (CRA).

To ensure we are compliant, it is critical we abide by the following:

1. We must ensure our grants support charitable purposes
2. We must only grant to CRA qualified donees, and each donee's own charitable activity, as defined by the *Income Tax Act*.

Qualified donees primarily include:

- Registered Canadian charities (including those with international operations)
- Registered Canadian amateur athletic associations
- Canadian municipalities

We are unable to support, for example:

- Any portion of a grant in which the donor receives a significant benefit in return (e.g. tickets, advertising, meals, entertainment, etc.) and would not otherwise receive a full tax receipt, for example:
 - Sponsorships
 - Memberships
- Unregistered nonprofit organizations and nonprofits without charitable status
- International charities not registered in Canada
- Unregistered sports groups and professional sport organizations
- Individuals



WHO CAN RECEIVE GRANTS (cont'd)

CANADA REVENUE AGENCY REFERENCES

- For information on whether an organization is registered with CRA, ask the organization for its charitable registration number, or visit the CRA website's **Charities Listings**:
www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html
- For information on qualified donees:
www.cra-arc.gc.ca/chrts-gvng/chrts/glssry-eng.html#qualdonee
- For information on charitable purposes, refer to Section I of *Registering a Charity for Income Tax Purposes*:
www.cra-arc.gc.ca/E/pub/tg/t4063/t4063-e.html#_Toc225579190

If you have any questions about whether we can grant to a particular organization or program, please contact our Donor Grants Associate.

DONEE MAILINGS

Unless you request otherwise, the only information we will forward to you from the recipients of your grant recommendations are letters of grant acknowledgement, personalized invitations and reports specific to the grants, if provided. We generally do not forward solicitations or general mailings from grant recipients, such as newsletters or annual reports due to the volume we receive and donor preference.

NEIGHBOUR GRANTS

You may choose to support this unique, multi-year initiative which supports resident-led projects that encourage neighbours, groups and public institutions to engage in dialogue and shared projects.

STUDENT AWARDS AND SCHOLARSHIPS

You may choose to support education through student awards and scholarships. TCF has a staff member dedicated to establishing and managing these types of award funds.

FIELDS OF INTEREST

If you are interested in supporting particular areas within the charitable sector (e.g. health and wellness, environment, education and lifelong learning, arts and heritage, recreation, community development, human services, etc.), please let our Donor Grants Associate know. We will be pleased to keep your interests in mind as charities contact us with opportunities to support exciting activities.

We would be happy to discuss any interest you may have in these areas.



MULTI-YEAR GRANTS:

Donors wishing to support particular charities or large programs over the long term occasionally choose to commit funds over a number of years. This provides charities with some assurance that they can rely on ongoing funding.

Donors should be cautioned, however, when relying on TCF Fund dollars to fulfill these commitments in future years.

Funds are subject to fluctuating markets and may not have stable amounts available to grant from year to year, particularly if markets drop. Unless TCF has directly entered into a signed agreement with a grant recipient, donors are personally responsible for ensuring their commitments are upheld. Please keep this in mind and be conservative with future commitments.

HOW TO SUBMIT GRANT RECOMMENDATIONS

We encourage you to use our secure online **Donor Central** service to make your grant recommendations. It is the fastest and most convenient way for you to:

- Submit grant recommendations to our Donor Grants Associate
- View the Foundation's current funding opportunities
- Check gift and grant histories
- Access charitable agency research
- View monthly Fund statements and Fund balances
- Update contact information

To register for **Donor Central**, visit www.thecalgaryfoundation.org, click on the icon on the bottom right hand of the homepage and register in minutes. Grant Recommendation forms are available online or can be requested from TCF's Donor Grants Associate. Forms can be submitted online, by fax or by mail.

Grant recommendations must be submitted in writing by the person(s) named as Fund Contact when the Fund is established. If the Fund Contact wishes to add another Fund Contact (e.g. a personal assistant or family member), permission must be provided in writing to TCF.

We strongly recommend minimum grants of \$250 to maximize the impact on each charity and reduce processing and reporting costs for charities and TCF.

FROM RECOMMENDATION TO CHEQUE THE GRANTING PROCESS

Once TCF receives your grant recommendation, the following occurs:

- The recommendation is reviewed to ensure it meets TCF requirements;
- The recommendation is approved and processed, or we will contact you if the recommendation cannot be fulfilled as submitted;
- Cheques are typically mailed on or about the middle and end of each month.

Please allow two to four weeks for your grant recommendation to be processed.

**Thank you for choosing The Calgary Foundation
to support your invaluable contribution to our community.**

We look forward to working with you!

700, 999 8th Street SW, Calgary AB T2R 1J5 • 403-802-7700