

Services and Donor Support

Donor-Advised Funds	Funds \$25,000 to \$99,000	Funds \$100,000 to \$499,000	Funds \$500,000 & Above
Process donor's grant recommendations (made by fax, e-mail, online portal or mail) within 5 business days for "pre-approved" groups and others in less than a month	X	X	X
Donors to recommend no more than 50 grants a year (minimum \$200)	X	X	X
Grant recommendations researched to confirm charitable status	X	X	X
Fund's grant records maintained for life	X	X	X
Access to donor portal	X	X	X
Report of fund activity through mailed quarterly fund statements	X	X	X
Invitation to annual meeting/annual event and donor education events	X	X	X
Added to all publications mailing lists	X	X	X
More than one advisor may participate in recommendation process		X	X
CCF's grant application form sent to up to 10 donor-selected groups, reviewed by staff and forwarded to donor		X	X
Request for Proposal (RFP) process facilitated by CCF		X	X
Analytical report on cumulative grantmaking as requested		X	X
Up to five staff-scheduled site visits to nonprofits a year as requested		X	X
Multi-year grants allowed		X	X
One in-person annual review with staff		X	X
Special invitations		X	X
If fully endowed, may choose Investment options			X
Staffing of Grants Committee that meets no more than twice per year			X
Customized application form			X
Proposals summarized by staff			X
Grant application process expanded to 25 groups per year			X
Annual donor/family planning session with CCF staff			X
Up to 10 staff-scheduled site visits to nonprofits per year as requested			X
End-of-grant and interim reports obtained from grantees and summarized for donor			X
One in-person review with senior leadership			X

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Scholarships	Funds \$25,000 to \$500,000	Funds \$500,000 to \$3,000,000	Funds \$3,000,000+
General (1-year or renewable)	x	x	x
• Scholarships start at \$1,000	x	x	x
• Notification when applications are available	x	x	x
• Notification and bio of recipient	x	x	x
• Scholarship listed on general application	x	x	x
• Donor biography info sent to student	x	x	x
Renewable		x	x
• All above, plus		x	x
• Scholarships start at \$5,000		x	x
• Ability to customize application		x	x
• Donor input on scholarship committee		x	x
• Targeted outreach with schools		x	x
• Involvement in interview process for scholarship finalist (2-5)		x	x
• Staff-organized recipient luncheon		x	x
Renewable			x
• All above, plus			x
• Scholarships start at \$10,000			x
• Students participate in professional development workshops			x
• Quarterly communications with staff and recipients			x
• Bi-annual scholar community building events			x
• Intern matching program for recipients			x

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