# Grant Recommendation

San Diego Foundation

To submit your completed grant recommendation, please mail to: San Diego Foundation, Attention: Grants, 2508 Historic Decatur Rd., Ste. 200, San Diego, CA 92106, or email: grants@sdfoundation.org, or fax to: (619) 814-1332. You may also recommend a grant online via SDFoundation.org/MySDF. Grants meeting SDF's due diligence requirements are generally mailed within 7-10 business days.

Name of Fund: Fund Number:

Total Grant(s) Recommended:

## Grant Acknowledgement

☐ Please ask the grantee to send acknowledgements directly to me at the following address:

Name(s):

Mailing Address: City/State/Zip:

## Grant Recommendation #1

Organization Name: Federal Tax ID Number:

Mailing Address: City/State/Zip:

Contact Name and Title: Phone/Email:

Grant Amount: (Min. $250) ☐ *Follow-up Requested (Available for grants $50,000 or higher) ☐ Anonymous Fund ☐ Anonymous Donor

*To request a follow-up report for grants under $50,000 (e.g. with special circumstances), please contact your Donor Manager.

Charitable Purpose of Grant (if other than for general support):

Internal Use Only:

Amount Recommended Available: GuideStar Report: Grant ID:

By signing below, I acknowledge the above recommendation does not represent the payment of any personal pledge or other financial obligation, nor does the undersigned expect any personal benefit from this charitable distribution. I also understand that San Diego Foundation's policy requires for grant checks and award letters to be mailed directly to the grantee. (See p.3 for complete grant recommendation guidelines)

Advisor Signature: Date:

Print Name: Email:

## Grant Recommendation #2

Organization Name: Federal Tax ID Number:

Mailing Address: City/State/Zip:

Contact Name and Title: Phone/Email:

Grant Amount: ☐ *Follow-up Requested ☐ Anonymous Fund ☐ Anonymous Donor

(Min. $250) Available for grants $50,000 or higher

*To request a follow-up report for grants under $50,000 (e.g. with special circumstances), please contact your Donor Manager.

Charitable Purpose of Grant (if other than for general support):

Internal Use Only:

Amount Recommended Available: GuideStar Report: Grant ID:

## Grant Recommendation #3

Organization Name: Federal Tax ID Number:

Mailing Address: City/State/Zip:

Contact Name and Title: Phone/Email:

Grant Amount: ☐ *Follow-up Requested ☐ Anonymous Fund ☐ Anonymous Donor

(Min. $250) Available for grants $50,000 or higher

*To request a follow-up report for grants under $50,000 (e.g. with special circumstances), please contact your Donor Manager.

Charitable Purpose of Grant (if other than for general support):

Internal Use Only:

Amount Recommended Available: GuideStar Report: Grant ID:

## Grant Recommendation #4

Organization Name: Federal Tax ID Number:

Mailing Address: City/State/Zip:

Contact Name and Title: Phone/Email:

Grant Amount: ☐ *Follow-up Requested ☐ Anonymous Fund ☐ Anonymous Donor

(Min. $250) Available for grants $50,000 or higher

*To request a follow-up report for grants under $50,000 (e.g. with special circumstances), please contact your Donor Manager.

Charitable Purpose of Grant (if other than for general support):

Internal Use Only:

Amount Recommended Available: GuideStar Report: Grant ID:

Reminder: SDF cannot fulfill pledges, pay for memberships, or incur benefits (e.g. event dinners or purchase tickets)

# San Diego Foundation Grant Recommendation Guidelines

Thank you for submitting your Grant Recommendation. Please be advised that in order to maintain its own tax-exempt status, San Diego Foundation must review, approve, or decline grant recommendations. Listed below are a few guidelines to help you with your grant recommendation.

- San Diego Foundation can only grant to qualified public charitable organizations (i.e. 501(c)(3), operating foundations, governmental, religious and educational institutions).
- Per IRS guidelines for Donor-Advised Funds, San Diego Foundation is not permitted to distribute grants to individuals, type 3 supporting organizations, or private non-operating foundations.
- Grant checks and award letters are made to the legal name of the grantee and mailed directly to its address.
- Grants must be used entirely for charitable purposes.
- Any grant that provides more than an incidental benefit to donors or fund advisors and/or their families is not permitted. Under the Pension Protection Act of 2006, monetary penalties apply to you personally if you receive a prohibited benefit or you recommended a grant which results in a prohibited benefit.
- To request a follow-up report for grants under $50,000 (e.g. with special circumstances), please contact your Donor Manager.
- Final approval of grant disbursements resides with San Diego Foundation's Board of Governors and President and CEO. Grants are presented each week through an approval poll. Grant recommendations must be submitted by noon on Thursday for inclusion in the current week's approval poll. Recommendations received thereafter will be submitted with the following week's approval poll.
- Grants meeting SDF's due diligence requirements are generally mailed within 7-10 business days.
- For grants to international organizations, San Diego Foundation must establish charitable equivalency per IRS guidelines for grants from Donor-Advised Funds. Additional time and fees may be required to perform additional due diligence.