



INNOVIA  
FOUNDATION

# GUIDE TO DONOR-ADVISED FUND GRANTMAKING

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**MISSION:** To ignite generosity that transforms lives and communities.

**VISION:** Vibrant and sustainable communities where every person has the opportunity to thrive.

**VALUES:** Innovative, Inclusive and Collaborative

## THIS GUIDE WILL HELP YOU:

1. Understand Innovia's donor-advised grantmaking process
2. Adhere to IRS regulations for donor-advised funds
3. Access Innovia's professional services to assist you with grantmaking.

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# RECOMMENDING A DONOR-ADVISED GRANT

## DONORVIEW

We strive to make recommending grants from your DAF fast and easy.

We recommend making grants through DonorView, our online donor portal. DonorView (<https://innovia.iphiview.com>) allows you to view the fund's available-to-spend balance, review grantmaking history, make new grant recommendations and more. If you need assistance or need to gain access to DonorView, email [core-team@innovia.org](mailto:core-team@innovia.org) or call 509-624-2606.

**GRANT RECOGNITION TYPES:** There are several ways to be recognized when the letter and grant check are sent to nonprofit partners. See below for each recognition level and anonymity type. You will select an option when making the recommendation online:

- **Fund Name + Donor Name(s) + Address:** Selecting this option will display the recommender(s) name, address and the Fund Name on the letter provided.
- **Fund Name + Donor Name(s):** Selecting this option will display the recommender(s) name and the Fund Name on the letter provided.
- **Fund Name + Donor Address:** Selecting this option will display the recommender(s) address and the Fund Name on the letter provided.
- **Fund Name:** Selecting this option will display the Fund Name only on the letter provided.
- **Donor Name(s) + Address:** Selecting this option will acknowledge the recommender(s) by name and address on the letter provided.
- **Donor Name(s):** Selecting this option will display the recommender(s) name only on the letter provided.
- **Donor Address Only:** Selecting this option will display the recommender(s) address only on the letter provided.
- **Anonymous:** Selecting this option will make the grant anonymous.

**Please review the form before submitting your recommendation. All grants will be processed according to the information entered in DonorView.**

Unable to access DonorView? Contact [core-team@innovia.org](mailto:core-team@innovia.org) or 509-624-2606.



## WHAT CAN I SUPPORT?

### ORGANIZATIONS ELIGIBLE FOR A DONOR-ADVISED GRANT INCLUDE:

1. Religious organizations
2. Public agencies (schools, libraries, cemeteries, parks, etc.)
3. 501(c)(3) public charities.

Private foundations or other types of nonprofits, like service groups, a Chamber of Commerce or other member-benefit organizations are not eligible.

Grants to individuals are not permitted.

**GRANT SIZE:** The minimum grant size is \$250.

## IRS REGULATIONS

The IRS has legal restrictions that regulate donor-advised funds (DAFs). These are listed below.

**NO PLEDGES:** Donor advisors may not fulfill a legally-binding pledge through a grant from a DAF. Please do not sign a pledge for a grant to any potential grantee. If you do, the IRS will regard the payment of a grant in fulfillment of that pledge as a benefit to you as the donor since the DAF is fulfilling your personal financial obligation.

**NO BENEFITS TO DONORS:** Donor advisors, their families, or businesses they control may not benefit in any way from a grant recommended from their DAF. Please do not accept any benefit for any grant recommended from a DAF.

**RECOGNITION:** All recognition for grants you recommend is attributed to the DAF, not to you as an individual donor. When the grant is paid, the grantee will be instructed to recognize the “[name of your fund] at Innovia,” not you as an individual, organization or business. This is not intended to deprive you of recognition for your generosity, but instead to protect you from violating IRS regulations.

# PROCESSING YOUR GRANT REQUEST

**Grant checks are processed every Wednesday.** Grants submitted on Tuesday before 10 a.m. PST will be processed the following day. If the grant request is received after 10 a.m. Tuesday, the grant check will be processed the following week.

Grants may take additional time to process if there are any unusual circumstances. The most common difficulty is when verifying the 501(c)(3) status of a recommended organization. The Innovia Core-Team will inform you if there is a delay in processing your recommendation.

Grant recommendations during November and December may take longer to process. We encourage donors to recommend grants throughout the year and not wait until year-end. Nonprofits appreciate grants anytime of the year and especially during non-holiday months.

## INNOVIA ANTI-HATE POLICY

Innovia will not make grants to organizations that Innovia knows or has reason to believe support or engage in hateful activities. Innovia will implement this policy through due diligence to ensure that hateful activities are identified, and steps are taken to avoid any Innovia support for them.

Hateful activities is defined to mean activities that incite or engage in violence, intimidation, harassment, threats or defamation targeting an individual or group based on their actual or perceived race, color, religion, national origin, ethnicity, immigration status, gender, gender identity, sexual orientation or disability. These activities are contrary to Innovia's mission and its charitable purpose. Innovia relies on data crosschecked from various sources to determine if a nonprofit fits in one of these categories.

Decisions regarding grant distributions from a donor-advised fund, and the investment of assets, are made at the sole discretion of Innovia in furtherance of its charitable mission.

# POST-GRANT REPORTING

To ensure accountability without creating an administrative burden on our nonprofit partners, Innovia grant reporting guidelines are as follows:

## **\$250.00 - \$4,999.99**

No reporting is required for these grants.

## **\$5,000.00 and above**

For program or project related grants, reporting may be required from grantees including photographs and/or a brief narrative describing the outcomes of the program or project. Innovia may also request a detailed accounting of the use and expenditure of grant funds.

## **General Operating Grants**

No reporting is required for these grants.



# INFORMATION ABOUT YOUR FUND

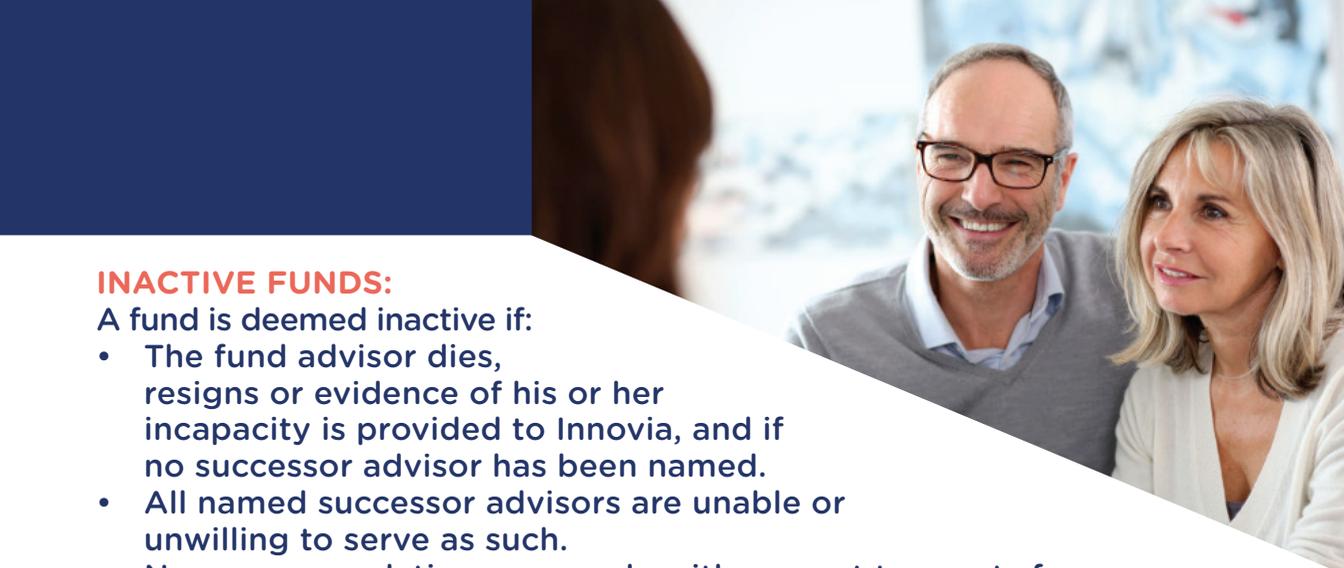


**FUND BALANCE:** The “available-to-spend” balance, i.e., the amount of money available for grantmaking, can be viewed at any time on DonorView. This is updated daily and reflects any recent grant activity.

**USING THE DISTRIBUTION:** Grants from donor-advised funds are intended to be used to benefit philanthropic causes. Although the IRS does not currently regulate how much must be spent from donor-advised funds, Congress is paying particular attention to the topic. Future federal regulation to require spending from DAFs is possible. Since unspent grant dollars do not have a beneficial impact, we ask that pass-through DAF advisors make grant recommendations annually and endowed DAF advisors spend out the available distribution each year.

**IF YOUR DAF IS ENDOWED:** Annually, Innovia will review performance of the investment portfolio and determine an appropriate amount to distribute based on performance. The objective is to distribute an amount after fees that will still allow the fund to keep up with inflation over time. The distribution will typically be within a range of 2-4% based on the value of the DAF.

See Innovia Foundation Endowment Distribution Policy for more information.

A photograph of a middle-aged man with glasses and a woman with blonde hair, both smiling and looking towards the left. They are in a professional setting, possibly an office or meeting room. The man is wearing a grey sweater over a light blue shirt, and the woman is wearing a white top. The background is slightly blurred, showing what appears to be a map or a large screen.

### **INACTIVE FUNDS:**

A fund is deemed inactive if:

- The fund advisor dies, resigns or evidence of his or her incapacity is provided to Innovia, and if no successor advisor has been named.
- All named successor advisors are unable or unwilling to serve as such.
- No recommendations are made with respect to grants from the fund for a period of two years and, during such period, the advisor or successor advisor is nonresponsive to Innovia's attempts to contact them.

If the fund becomes inactive, Innovia's Board will deem the advisory period to have ended and will initiate distributions from the fund in accordance with the provisions of the fund agreement.

**SUCCESSOR ADVISORS:** If you wish to involve your family in recommending grants, successor advisors must be documented in the fund agreement. For more information on amending your fund, please contact Innovia's Gift Planning team at 509-624-2606 or [info@innovia.org](mailto:info@innovia.org).

**PARTNERSHIP FUND:** We encourage you to support Innovia's mission of igniting generosity that transforms lives and communities by making an annual grant to the Partnership Fund. For more information on the Partnership Fund or Innovia's initiatives, please contact:

Chief Strategy Officer Aaron McMurray  
509-624-2606 or [amcmurray@innovia.org](mailto:amcmurray@innovia.org).

# ADDITIONAL SERVICES

**EXPLORE NEW PROGRAM AREAS:** We can help you explore new grantmaking opportunities or interests.

1. Innovia features organizations doing great work in our e-newsletters and under *Giving Opportunities* on the home page of DonorView.
2. We provide our donors with a donor questionnaire. Completing the questionnaire is optional, but it educates our team about your individual philanthropic interests and whether you would like to be alerted when new and special opportunities arise to make a grant in your area(s) of interest. For example, if you support the arts and culture sector in your town, we could alert you if we are aware of a new program being launched by the local art museum.

**EXPLORING MATCHING GRANTS:** If funding for the program is contingent on raising matching money, a funding challenge or matching grant opportunity is a great way to leverage grant dollars from DAFs.

**RESEARCH GRANTEES:** Innovia can research a potential grantee before you make a grant recommendation. We can provide information about organizations doing work you might like to support. For example, we can assemble a list of possible grantees that work in a specific program area or in a specific geographic area. We can also collect the following information from a potential grantee: board roster, financial statements, information on program activities, strategic planning documents and more.

**SITE VISITS:** Site visits are a great way to learn more about a grantee or potential grantee. We work with nonprofit organizations to arrange opportunities to speak to staff and tour facilities. Nonprofits generally enjoy showcasing their programs. Donors can learn much more about a program seeing it in action. We are happy to arrange those visits. Additionally, Innovia provides several site visit opportunities throughout the year with organizations across our region.

**COMPETITIVE GRANT PROGRAMS:** Innovia Foundation staff can work with fund advisors to build a competitive grant program for your DAF. Competitive grant programs are an excellent way to learn about potential nonprofit partners.

Competitive grant program services are typically provided for a small additional fee. For these types of arrangements, staff can perform the following services:

- Prepare a request for proposals and publicize the new grant opportunity.
- Accept competitive applications using online grant applications.
- Screen applications and verify compliance with eligibility requirements.
- Work with donors and grant review committee members to review and score applications.
- Assist in determining which grants you wish to recommend.
- Arrange site visits to visit applicants before making a decision.
- Arrange reports to monitor use of grant funds.

**QUESTIONS?** If you need any help or have questions about grantmaking from donor-advised funds, contact the Core-Team at 509-624-2606 or [core-team@innovia.org](mailto:core-team@innovia.org).

## CORE-TEAM

**Collette Jarvelin**  
*Donor Services Specialist*

**Lou Wilmot**  
*Administrative Assistant*

**Kathy Johnson**  
*Executive Assistant*

**Rachel Quick**  
*Program Associate*

**Lauren Nissen**  
*Philanthropic Engagement Manager*

## GIFT PLANNING TEAM

**Aaron McMurray**  
*Chief Strategy Officer*

**PJ Watters**  
*Director of Gift Planning*

**Chris Stiles**  
*Director of Gift Planning and Development*

**Amy Voeller**  
*North Idaho Regional Engagement Manager*



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[innovia.org](http://innovia.org) • [info@innovia.org](mailto:info@innovia.org) • 509-624-2606 • 

421 W Riverside Ave., Ste. 606  
Spokane, WA 99201