

## FUNDING PARTNER CRITERIA AND ELIGIBILITY

GIH limits Funding Partner status to organizations who fall into one of the following categories:

- Entities whose primary function and activity is charitable grantmaking to multiple individuals or organizations;
- Operating foundations;
- Regranting organizations, also known as intermediaries, for whom grantmaking is at least substantial portion of your annual budget and who donate to more than one entity or organization; and,
- Philanthropic advisors who work closely with foundations, whether as consultants or on their behalf.

The following types of organizations are eligible to become Funding Partners:

**Community Foundation:** A nonprofit, independent, publicly-supported, philanthropic institution organized and operated primarily as a permanent collection of endowed funds for the long-term benefit of a defined geographic area (validation: Form 990 or Form 1023 and IRS determination letter).

**Corporate Foundation:** A private foundation that derives its grantmaking funds primarily from the contributions of a profit-making business. A corporate foundation is a separate, legal organization from the donor company. It is subject to the same rules and regulations as other private foundations (validation: Form 99–PF or Form 1023 and IRS determination letter).

**Corporate Giving Program:** A grantmaking program established and administered within a profit-making company. Gifts and grants go directly to charitable organizations from the corporation (validation: annual report and giving guidelines).

**Government Agencies:** Federal and state government agencies that fund GIH projects and programs. GIH will also permit special tax collection efforts (e.g. a Municipal Fund) designed to address social issues in a community or region to participate in GIH as a government agency (validation: signed notice of grant award or verifiable, online documentation of grantmaking activities).

**Operating Foundation:** A private foundation that uses the bulk of its income to provide charitable services or to run charitable programs of its own (validation: Form 990-PF).

**Philanthropic Advisors, to include Banks, Trust Companies, or Private Firms.** Companies that manage philanthropic funds. These professional organizations counsel clients on the formation of charitable entities and can serve as staff or thought partners in managing the implementation of grantmaking programs. Many also provide legal or fiduciary support. Professional philanthropic advisors must affirm to GIH that the services they routinely provide fit into one or more of the following categories:

- helping foundation staff develop their grantmaking priorities;
- developing foundation strategies for specific grantmaking program areas;
- crafting or managing grant application procedures;

- researching and/or forging relationships with prospective grantees;
- managing relationships with existing grantees;
- coordinating the grant evaluation process, including the preparation of materials for board review;
- managing the disbursement of funds to grantees;
- developing and coordinating the evaluation of grant outcomes.

Professional philanthropic advisors pay by following one of two methods:

- An advisory firm or select members of the firm, whether one or more individuals, may join GIH as the representative of a client foundations or funds. The client organization will join as a regular Funding Partner and pay standard GIH dues based on its annual health giving. The associated advisor(s) will enjoy full Funding Partner status. No other staff at the advisory firm will have access to GIH programs or resources under this option. (validation: written verification of the professional firm's activities in managing the charitable funds, fund asset levels, and annual health giving).
- An advisory firm may become a GIH Funding Partner and give its staff access to programs and resources. The firm determines its contribution by multiplying GIH's prevailing individual fee [currently \$1,000] by the firm's number of FTE professional positions. Trustees and staff of the firm's client foundations will not be considered GIH Funding Partners under this method (validation: a written description of the advisory firm's routine services and offerings). Professional references may be requested. Firms with three or more individuals wishing to participate in GIH may contact Beth Harris for a group discount ([bharris@gih.org](mailto:bharris@gih.org)).

**Private Foundation:** A nongovernmental, nonprofit organization with funds and programs managed by its own directors, established to maintain or aid social, educational, religious, or other charitable activities, primarily through grantmaking (validation: Form 990-PF).

**Regranting Institutions, to include Public Foundations or other Intermediaries:** A nonprofit, independent organization that receives its assets from multiple sources, which may include private foundations, individuals, government agencies, and fees for services. **To qualify as a GIH Funding Partner, a substantial percent of the operating budget of a public foundation must be for grants, not including awards to affiliate chapters or organizations** (validation: Form 990 or Form 1023 and IRS determination letter).

GIH may request documentation to validate organization type.