

Stewarding Community Foundation Fundholders

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What is a Community Foundation?

- 501(c)(3) public charity
- Manages charitable accounts called “funds” that help individuals, families, businesses, and groups streamline their philanthropy
- Contributions into funds at the Community Foundation are tax deductible and donors receive a tax receipt upon making a gift into the fund



What is a Fundholder?

- A fundholder (sometimes also referred to as “fund advisor”) is a person who manages a charitable fund at the Community Foundation, often making grant distribution recommendations from the fund.




Offline Donor Advised Give for Good Louisville Donations

- Any gift* received from a Community Foundation fund is categorized during Give For Good Louisville on an organization's dashboard as a donation type of "Offline – Donor Advised Funds."
- To display Offline – Donor Advised Funds donations, navigate to Reports -> Donations and filter by Donation Type.

**The exception to this is matching donations from a Community Foundation fund. Like any other match, these will be distributed via check directly to the organization.*



Donations

 Dates and times on this page are displayed in your computer's time zone. If you export your donations from this page, dates and times in that file will appear in UTC to assist with bank statement reconciliation processes. [Learn More](#)

Search by donor name or email:

Filter by Giving Day or Site:

Give For Good Louisville (2023)

Filter by Campaign:

All Campaigns


Filter by Donation Type:

Offline - Donor Advised Funds

 Start Date

Select start date



 End Date

Select end date



Ensure that you are filtering by the particular year and the donation type, as displayed in the image above.



Offline – Donor Advised donations are important to differentiate

- They should not be receipted. The donors have already received a tax receipt when they made the contribution into their fund.
- The money earned from these donations is deposited into your bank account separately from online credit card donations (and may take 3-4 weeks to receive).
- The deposit for Offline – Donor Advised donations will be lumped with any prize and/or bonus earnings for the giving day.



With that said...

- Please thank your Community Foundation fundholder donors.
- You do not need to wait for the deposit to hit your bank account. If they are on your dashboard, be assured those donations will be deposited within a month.
- Community Foundation fundholders make up roughly 40% of the dollars raised on the giving day.
- Acknowledge them correctly.



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Give for Good Louisville 2022 (2022) ▼

Filter by Campaign:

All Campaigns ▼

Filter by Donation Type:

Offline - Donor Advised Funds ▼

Start Date

Select start date

✕

End Date

Select end date

✕

| Actions | Donation ID | Date ▼ | Donor ▼ | Intended Donation ▼ | Amount Charged | Bank Fees | Platform Fees | Covered Fees? | Payor |
|---------|-------------|----------------------|--------------------|---------------------|----------------|-----------|---------------|---------------|-------|
| + | 5740221 | 8/18/2022 11:43AM | Kate Biagi-Rickert | | | | | | |



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Offline - Donor Advised Funds ▾

Start Date

Select start date

✕

End Date

Select end date

✕

| out Date ▾ | Payout ID | Display Name | Donor Address | Donor Phone Number | Give Again? | Anonymous? | Recurring? |
|------------|-----------|-----------------------------------|---------------|--------------------|-------------|------------|------------|
| | | Kate Biagi-Rickert & Tony Rickert | | | | | |



Credit for Offline – Donor Advised Donations



When entering an Offline – Donor Advised donation from Give For Good Louisville into your database, or anytime your organization receives a contribution from a charitable fund at a Community Foundation or commercial Donor Advised Fund Sponsor, the Community Foundation/DAF Sponsor is the legal donor. We encourage you to “soft credit” the individual(s) who requested the distribution from the charitable fund.



Final Note: Give For Good Louisville Matches

If a Community Foundation fundholder notifies you that they would like for their donation for the giving day to be added as a match, please notify the Community Foundation Grants Team as soon as possible.

grants@cflouisville.org

We will go into more depth about matches during a webinar
[July 12, 2023 10:30 AM.](#)



A photograph of four young women of diverse backgrounds laughing and smiling together outdoors. The woman on the far left has blonde hair and is wearing a denim jacket. The woman next to her has dark skin, glasses, and a headwrap. The woman next to her has light skin and is wearing a tan cardigan. The woman on the far right has dark hair and is wearing a white t-shirt. They are all looking towards the camera and laughing heartily. The background shows trees and a clear sky.

THANK YOU!



**Community
Foundation**
OF LOUISVILLE