

**Chosen Valley Community Foundation
Donation Worksheet**

Name _____

Address _____

Contact information

Phone _____ e-mail _____

We are very proud of our donors and would like to acknowledge your contribution publicly. However, we also respect your privacy. Do you want your donation to remain anonymous? (circle one) Yes No

What kind of donation is this (cash, stock, real estate)? _____
Items other than cash will require additional forthcoming information.

What is the estimated value? _____

What fund would you like your donation to go to?

Permanent (only interest and appreciation is used to fund activities) _____

Consensus (all money available to fund activities) _____

Designated _____

If you chose the designated fund you must fill out the following questions.

Describe as accurately as possible the intended recipients (individuals or programs) of this program. The more detail in this description, the more we will be able to identify the intended audience.

As a granting agency, we often see that there are many qualified recipients for the limited amount of money we have to give. Please help us prioritize how you would like us to decide on the proper recipients of the money.

Merit – Merit based decisions typically start with some kind of criteria. Examples of merit include grades, raised matching funds, number of volunteers for a project etc. The more merit based criteria for determination the better. For example, a program to support the visual arts might have the following merit criteria; First priority – to work with students under 12 years of age; Second criteria – to work with the most students possible; Third criteria – to have a mechanism to display completed projects within 12 months of the grant.

Please list the merit criteria and identify their importance.

Need – Need is the other major method for deciding the grant recipient. Need can be determined on individual basis using tax returns, or in groups based on budgets for the projects, historical fund raising capacity etc.

Please list if need should be evaluated and the mechanism for determining need.

Merit and Need. Combination of merit and need can also be used. If both are to be considered, please prioritize the merit and need profiles.

Grant size and frequency.

How big would you like the grants (it can be a range)? _____

How often? _____

Can the same individuals/groups apply more than once? _____

Any other restrictions?

The life of the fund. Depending on the size of the donation, the entire fund could be granted in a single cycle or over the course of many years. The longer the fund, the more money required to perpetuate.

How long would you like this fund to last? _____