



Stonewall's Fund Partner Program

Types of Funds, Services and Fees

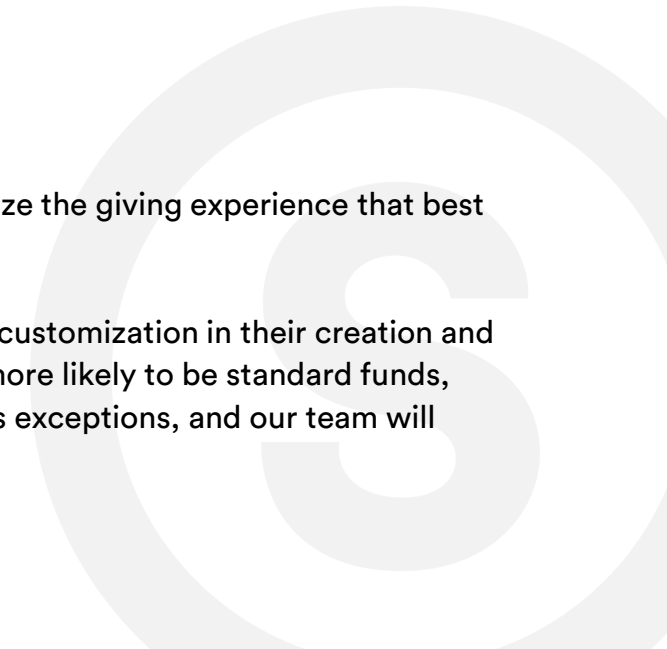
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Types of Funds

At Stonewall Community Foundation, we have six major types of funds in three categories to help customize the giving experience that best suit your needs.

Standard funds follow customary and traditional guidelines and specialized funds involve greater levels of customization in their creation and the mechanics of their grantmaking. Generally, donor-advised, designated and field of interest funds are more likely to be standard funds, while scholarship and endowed funds tend to be specialized. Giving circles can be either. There are always exceptions, and our team will gladly work to present you with solutions aligned to your goals and interests.



Standard Funds

Donor-Advised Funds

With a donor-advised fund (DAF), you can recommend charitable grants to any 501(c)(3) organization. It is simpler than opening your own foundation, and contributions to DAFs have higher deduction limits than donations to private foundations. Stonewall will vet organizations for good standing and process all grants from your fund. There is no limit to the number of grants you can make.

Donor-advised funds usually carry the name of the donor or are named in a meaningful way upon creation.

Designated Funds

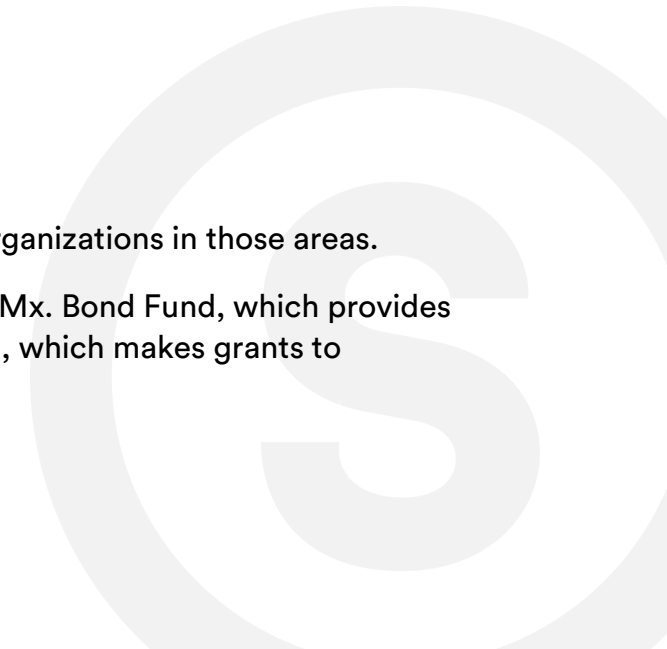
If you know which nonprofit(s) you'd like to support, you can set up a fund to make recurring grants to them over a period of time. Should circumstances change, we can redirect funds to ensure continued meaningful impact in our community.

Designated funds at Stonewall include: the Harry Bartel Memorial Scholarship Fund and the Kenneth McCarthy Memorial Scholarship, which both support specific organizations serving college-bound LGBTQ youth; and the Dr. Oscar Fred Rothchild Fund, which was set up to continue supporting Dr. Rothchild's favorite organizations as a memorial.

Fields of Interest Funds

Tell us which issues are important to you, and we will create a one-of-a-kind grants portfolio supporting organizations in those areas.

Field of interest funds at Stonewall include: the Vessel Fund, which supports queer arts organizations; the Mx. Bond Fund, which provides direct support to organizations and projects that are by and for TGNC people; and our LGBTQ Youth Fund, which makes grants to organizations and programs serving LGBTQ youth.



Standard Funds

Giving Circles

Have a group of friends, colleagues, or other folks with whom you share a common philanthropic interest? Perhaps there is a certain issue or identity that connects you? A giving circle, where smaller individual gifts from a group of people are aggregated, allows you to amplify your giving.

Giving circles at Stonewall include: our Dad Fund, funded by LGBTQ fathers to support more than 30 issue areas; Kavod: a Gay Men's Giving Circle, for men of Jewish descent; and The Swish Ally Fund, designed to support organizations and programs that engage straight allies in the fight for LGBTQ Equality.

Minimum Investment for Standard Funds: \$5,000



Specialized Funds

Specialized funds required a greater level of input and collaboration between staff, founding donors, and the community. Often this will take the form of a custom grant application, targeted promotion, a tailored grant review process, and/or the convening of a dedicated selection committee. Any of our standard fund structures can be customized into unique vehicles for your philanthropy. Specialized fund fee structures apply.

Scholarship Funds

You want to start your own scholarship program, but lack the resources to administer it on your own. There are also important legal regulations and ethical guidelines surrounding charitable gifts for scholarships. Stonewall staff can:

- Identify ways to best support next generation leaders
- Help you create an application to find ideal candidates
- Advertise scholarship opportunities in relevant networks
- Manage the vetting process of applications received
- Convene an advisory panel to help make decisions
- Provide full administrative and financial services

Minimum investment varies, based on program particulars, but starts at \$50,000 for a new fund.

Endowed Funds

Each of the fund types described above can be endowed, that is, set up as a long-term investment. Each year, a fixed portion of the endowment, either a specific dollar amount, or a percentage of the fund, is paid out as grants or scholarships. Earnings, in turn, help support those annual payouts, cover fees, and extend the life of the fund, oftentimes permanently.

A minimum initial investment of \$30,000 is required to set up an endowed fund.



Benefits Offered

Stonewall fund partners get highly personalized, one-on-one services and support provided by our team.

Field Expertise

We can prepare a grants docket for you that leverages more than five decades of experience and hundreds of institutional connections, and we are happy to answer questions, guide your process, or research new opportunities for your philanthropy. While our history is deeply rooted in NYC, our work and knowledge stretch well beyond our own neighborhood, and a network of LGBTQ community foundations helps amplify and support our reach nationwide.

Personal Touch

Our staff all come to Stonewall with a deep, personal investment in this work. Many of us have backgrounds in activism, and bring our own passion for our community to Stonewall's fund partners and their interests. This sense of involvement with and empathy for the people and organizations we serve dramatically underscores our ability to make meaningful connections between you and our grantees. We pride ourselves in building relationships with each fund partner, which means having access to a team of people who get it and get you.

Educational Perks

Stonewall provides learning opportunities, not only through regular newsletters, including one published specifically for fund partners, but also through site visits, tours, and educational forums. We also sponsor community events to which our fund partners are invited.

Community Connection

Through Stonewall, you are connected to our network of nonprofits, community activists, thought leaders and other fund partners. We are excited to facilitate meetings, conversations and connections across our community, including with other donors and fund partners.

Benefits Offered

Grant Management

From the moment you recommend a grant, our team is working for you to get funds into the hands of community organizations that need support. We fully vet new organizations, ensure their tax-exempt status, and work with them to facilitate quick grant fulfillment (ACH transfers during the COVID-19 Pandemic).

Fund Investment Management

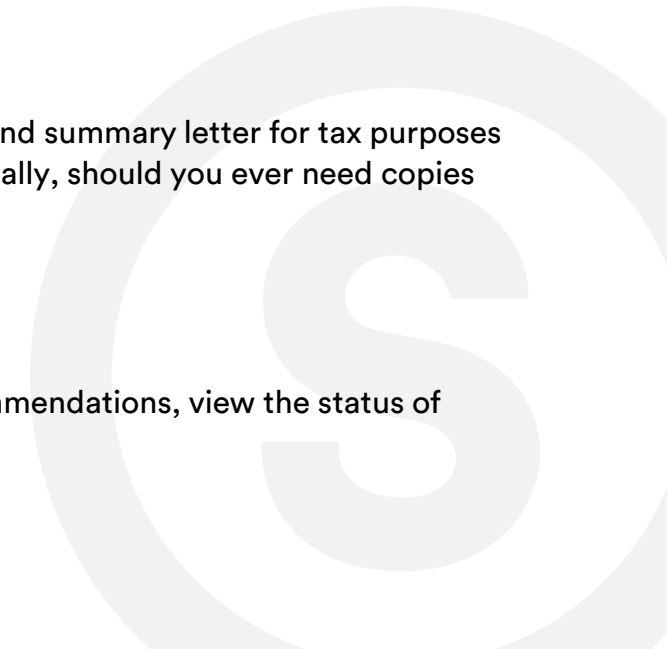
Stonewall maintains its funds at [Trillium Asset Management](#) and has four pooled investment options for your funds: Growth Portfolio, Moderate Growth Portfolio, Stable Value Portfolio and Money Market Portfolio. The elements and advantages of each of these vary based on a fund partner's needs and the nature of their fund. We are proud to work with investment managers who share our vision of environmental, social responsibility and governance stewardship. While all investment involves risk, and past performance is no guarantee of future success, we ensure that our financial partners are aligned with our ethos and outlook. For information about our investment options and Trillium, please click [here](#).

Streamlined Administration

While you will receive acknowledgement when you make gifts to your fund, we will also send you a year-end summary letter for tax purposes in January and provide an annual overview of the Foundation's trajectory and fiscal performance. Additionally, should you ever need copies of reports, acknowledgements, or other documents, we are happy to provide them.

Online Fund Partner Portal

Our online system, Foundant, is easily accessible to check on the standing of your fund, make grant recommendations, view the status of grants, download quarterly statements, and more! Staff are available for training, question and support.



Fee Structure

	Standard Funds	Specialized Funds
Set Up Fee	\$0	\$2,500
Minimum Opening Gift	\$5,000	\$50,000
Minimum Annual Gift to Stonewall	\$0	N/A
Minimum Fees	\$250, if no grants made in a calendar year	\$2,500
Fee Based on End of Year Balance	1.25%; or, 0.75% for funds with a balance of >\$250,000; or, 0.5% in a year when the fund (or its fund partner) has directed a \$2,500 or greater gift to SCF's Operating Fund	2%
Minimum Annual Grants (total dollars)	\$0	\$20,000
Minimum Grant Size	N/A	\$1,000
Minimum Average Balance	\$500	\$22,500
Grant Disbursement Timing	Monthly	Depends upon Program Design