COMMUNITY IMPACT FUND

Established by a donor to support the changing community. The most flexible of funds, it grows with the community over time, allowing support of a variety of emerging needs and opportunities that come to the forefront for Lancaster County.

MINIMUM CONTRIBUTION LEVEL

$10,000

Can be achieved over five years; annual spending amount is reinvested until minimum is achieved.

ACCEPTABLE GIFT TYPES

- CASH/CHECK
- CREDIT CARDS (via secure online contributions)
- PUBLICLY-TRADED AND CLOSELY HELD SECURITIES
- BEQUESTS liquid assets as well as tangible personal property and real estate
- RETIREMENT FUNDS
- TANGIBLE PERSONAL PROPERTY/REAL ESTATE
- LIFE INSURANCE

FOUNDATION OVERSIGHT FEES*

First $1 Million 1.50% OF FUND MARKET VALUE
Next $2 Million 1.30%
Balances Over $3 Million 1.10%

*Fees are pro-rated and charged monthly

INVESTMENT FEES

APPROXIMATE AVERAGE OF 0.45%; Investment returns are posted to funds net of investment management fees

ANNUAL SPENDING POLICY

TYPICALLY 3.5% OF BLENDED MARKET VALUE
based on five-year rolling average of fund’s market value

PAYMENT POLICY

ORGANIZATION(S) CAN APPLY THROUGH ANNUAL COMPETITIVE GRANT CYCLE OR ORGANIZATIONS CAN BE IDENTIFIED AND INVITED TO PARTICIPATE.

BENEFITS

- Donor selects fund name and description at $10,000 level
- Fund listing on Community Foundation’s website
- Secure online giving—currently with no transaction fees (typically 3%) and personalized acknowledgments
- Professional investment management provided by Glenmede (www.glenmede.com)
- Planned giving and donation assistance with complex assets
- Annual fund report and favorable tax treatment

LANCFOUNDO.ORG