

Corporate Support Services and Fees

CORPORATE RESPONSIBILITY AND PHILANTHROPY SERVICES	Basic	Plus	Premium
Account Managers and Online Resources			
Access to a dedicated corporate responsibility manager as your point of contact for all SVCF services to ensure consistent, personalized consultation	x	x	x
24/7 online access to fund account and resources	x	x	x
Philanthropic Consultation and Program Management			
Oversight of grants processing from the fund	x	x	x
Annual consultation with SVCF staff on corporate philanthropic program, including strategic planning, program development, custom employee training and grantmaking best practices	x	x	
Facilitation of annual grantmaking program, including compilation, review and analysis of up to 50 nonprofit grant applications per year		x	
Facilitation of annual grantmaking program, including compilation, review and analysis of up to 150 nonprofit grant applications per year		x	
Training for corporate grantmaking committee on topics related to company's giving program		x	
Management of grantmaking program on company's internal or commercial database		x	
Outcomes and Impact Measurement			
Annual report on philanthropic activity in fund	x	x	x
Collection and dissemination of grantee final reports to company contact(s)	x	x	
Custom impact analysis of funding and grantmaking activity		x	
Nonprofit Partnership Development Services			
Ad hoc research and recommendations on subjects of interest or potential nonprofit partners	x	x	x
Consultations with potential and current grantees about the corporate giving program	x	x	
Ad hoc proposal review and proposal support for potential grantee(s)	x	x	
Facilitation of up to six site visits in the Bay Area annually to potential nonprofit partners		x	
Grants Administration			
Due diligence, grant review and grant payment for an unlimited number of U.S. 501(c)(3) public charities, U.S. public entities and international organizations for which SVCF holds an active Equivalency Determination Certificate	x	x	x
Due diligence, grant review, grant agreement and grant payment for up to 25 non-501(c)(3) U.S. organizations and/or non-U.S. organizations for which SVCF does not hold an active Equivalency Determination Certificate		x	
Due diligence, grant review, grant agreement and grant payment for up to 75 non-501(c)(3) U.S. organizations and/or non-U.S. organizations for which SVCF does not hold an active Equivalency Determination Certificate		x	
Custom award letter templates, including company guidelines and language	x	x	
Custom grant coding, to allow budget tracking of grants across programs/regions		x	

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CORPORATE RESPONSIBILITY AND PHILANTHROPY SERVICES		Basic	Plus	Premium
Fund Investment Management and Financial Services				
Expert guidance on the choice of one or more of SVCF's five investment pool options		x	x	x
Access to world-class investment managers and alternative investment strategies only available to large institutional investors		x	x	x
Management of your fund's investment pool, including quarterly fund statements and review, and convenient 24/7 online fund access		x	x	x
Quarterly fund statements through an online portal that details all fund activity, including gifts added to the fund, grants paid from the fund, investment pool activity and support fees		x	x	x
Acceptance of gifts of complex assets such as real estate and pre-IPO stock*		x	x	x
Marketing Services and Resources				
Link to your community relations/CSR website from SVCF website		x	x	x
Highlight of corporate responsibility success stories on social media, and in collateral materials and/or press releases, as applicable		x	x	x
Invitations to SVCF investment briefings and networking, education and convening events		x	x	x
Access to corporate responsibility-focused quarterly e-newsletter		x	x	x

CORPORATE SUPPORT FEES

Silicon Valley Community Foundation assesses support fees to cover the cost of administration and to continue our important work in our community. Fees provide the resources for SVCF to operate efficiently and effectively, ensuring due diligence in our grant processing, donor and nonprofit education, research and other activities. Annual fees are assessed monthly based on average fund balance.

Corporate advised fund fees fall into three categories: basic, plus and premium. Based on the services selected, fees are established by SVCF in consultation with the corporate fund advisor when the fund is created. Fees may be reviewed and, if necessary, adjusted annually to ensure that fees remain equitable based on the services provided by SVCF. (A variety of factors determine whether a fund is considered basic, plus or premium, such as grantmaking volume, strategic services and staff time requirements.)

Fees	Basic	Plus	Premium
On the first \$5 million	1.50%	2.00%	2.25%
On amounts over \$5 million	0.75%	1.25%	1.50%
On amounts over \$10 million	0.50%	1.00%	1.25%
On amounts over \$15 million	0.25%	0.75%	1.00%
Minimum annual fee	\$500	\$4,500	\$10,000

Other Fees

Investment expenses are in addition to the administrative support fee charged by SVCF. SVCF will charge a one-time fee of \$15,000 for corporate advised funds created with less than \$1 million. Other fees may apply under special circumstances.

Contact Silicon Valley Community Foundation at donate@siliconvalleycf.org or call 650.450.5444 for additional information.

*Additional fees may apply for these types of gift transactions.