

Community Foundations Legal Help Desk

Philanthropy Southwest is pleased to announce that an exciting pilot program, the Community Foundations Legal Help Desk, is now available to you. Our colleagues at the Indiana Philanthropy Alliance (IPA), which has been providing legal assistance to its community foundation members for many years, will be operating the Help Desk.

The Help Desk is designed to provide community foundations with access to answers to legal questions related the operation of a community foundation. We all know that our community foundations deal with complex legal issues related to fund management, planned gifts, scholarships, etc. and many do not have easy access to an attorney with expertise in this field.

The Help Desk is in its pilot phase. During this first year, the operations and costs will be reviewed and feedback from participants will be solicited. It is likely that adjustments will be made.

How Does it Work?

The service operates through website. Participants log in with a username and password and type in their question. The software will send it to the attorney “on-call” for their topic area. The attorney will respond either with a written answer or will make arrangements for a phone conversation.

The attorneys providing this service have specialized knowledge and experience in fund management, planned giving, nonprofit law, the Pension Protection Act, UPMIFA and other laws that specifically affect the operations of a community foundation.

The Details

- This service is designed to provide quick answers to questions and is limited to a maximum of one hour on any one question. The attorney will be able to advise the community foundation if they need to engage counsel to assist them with a complex legal issue or gift.
- The attorney will engage directly with foundation staff or board members, and will not work directly with donors or professional advisors.
- The attorney can review documents but will not prepare any documents.
- This service is for legal questions that relate to the operation of a community foundation, not legal issues facing a foundation’s grantees.
- Participants will be provided a free webinar on Legal Basics for Community Foundations.

Service Levels and Costs

	Cost	Assets	Service
Entry	\$750	Under \$10M	6 inquiries/year
Basic 1	\$1,000	Under \$25M	10 inquiries/year
Basic 2	\$1,500	Over \$25M	10 inquiries/year
Premium	\$2,500	Any size	Unlimited

How to Subscribe

If you are interested in subscribing to the CF Legal Help Desk, you need to contact the Indiana Philanthropy Alliance directly by sending an email to:
Belinda Scholl, Program Coordinator, bscholl@inphilanthropy.org

Belinda will send you a subscription agreement. Once you sign the subscription agreement and send a check to IPA you will receive login credentials and your subscription will be active for 365 days from the date you are provided your credentials. All the details you need are in the subscription agreement.