



FOUNDATION LEGAL HELP DESK RESOURCE

A service offered in partnership with:



New Partnership Delivers Foundations Legal Help Desk:

Many of our members have asked and we're now happy to respond to your inquiry about having legal services offered through our national organization, the Forum. As all of Philanthropy WV's peer organizations across the country work together, we wanted to deliver a legal service at a reduced rate (*yes, above your regular dues yet cost effective*) for our corporate giving and foundation members.

Philanthropy West Virginia is pleased to Announce that an exciting pilot program, the 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 foundation members for many years, will be operating the Help Desk.

The Help Desk is designed to provide foundations who are a member of Philanthropy WV with access to answers to legal questions related the operation of your foundation. We all know that our foundations deal with complex legal issues related to fund management, grants, scholarships, conflicts of interest, etc. and many do not have easy access to an attorney with expertise in this field. The Help Desk provides this service to you in an online format.

How Does It Work?

The service operates through a 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, grantmaking, nonprofit law, the Pension Protection Act, UPMIFA and other laws that specifically affect the operations of a 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 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, but 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 foundation, not legal issues facing a foundation's grantees.*
- *Participants will be provided a free webinar on Legal Basics for Foundations*

Service Levels and Costs

<u>Level</u>	<u>Costs</u>	<u>Foundation's Assets</u>	<u>Service Required</u>
Entry	\$750	Under \$10 Million	6 inquiries/year
Basic 1	\$1,000	Under \$25 Million	10 inquiries/year
Basic 2	\$1,500	Over \$25 Million	10 inquiries/year
Premium	\$2,500	Any size	Unlimited

How to Subscribe

If you are interested in subscribing to the Foundations' Legal Help Desk, you need to contact the Indiana Philanthropy Alliance directly by sending an email to: Belinda Scholl, Program Coordinator, bscholl@inphilanthropy.org and copying Philanthropy WV's Paul Daugherty at paul@philanthropywv.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.