

Order of Malta – American Association
Policy for
AREA DONATIONS (SOLICITED or UNSOLICITED)

Purpose

Occasionally an Area might decide to make a donation to a charitable organization in the event of a need. This could be either solicited or unsolicited, and outside of the normal window of Association Grants. Many of our Areas have their own reserves to carry out this generous act.

The following guidelines will help you determine which form you should use in order that we comply with the IRS regulations for Non-Profit Organizations.

Which Form to Use

Less than \$5,000 – Please use Short Form 3/11/2014

\$5,000 or more – Please use the regular Association Grant Application and

Receipt

When to Submit the Forms

Please submit your forms with your Quarterly Financial Reports to the New York Office to the attention of Kathleen Lyons, Controller.

When to do a Follow Up Form

If the Area donation is less than \$5,000-

- **no follow up form is necessary**

If the Area donation is \$5,000 or more –

- **please fill out and sign a grant follow up form at the end of the calendar year, just as you would with any regular grant**
- **This form should be attached to your 4th Quarters Financial Reports.**