



Community Fund Management Foundation dba Community Fund Ohio

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Where Quality of Life Matters

Distribution Policy: Caregiving and Related Services

This policy applies to all distribution requests to pay for services provided to a beneficiary by a person or entity that does not offer similar services to the public, for example, family members or friends. This does not apply to independent contractors or agencies who provide similar services to the public.

- The hourly rate may not be more than \$20.00 per hour.
- All distribution requests must include a log that identifies:
 - The full name of the person providing the service;
 - The relationship between the service provider and the trust beneficiary;
 - The date(s) of service;
 - The start and end time; and
 - The type(s) of service provided.
- It is recommended that the log be signed by the beneficiary, if he or she is a competent adult, or the beneficiary's guardian, power of attorney, or designated advocate. Logs submitted for payment directly to the designated advocate that are not approved by another other party may not be accepted.
- Community Fund Ohio will consider approving travel time or reimbursement for mileage at the applicable IRS rate, but not both. Any distribution request for travel time or mileage must include detailed information about the miles driven, the reason for the travel, and anything else that supports the request.
- All distribution requests must be submitted after the services have been provided and shall either be a reimbursement to someone other than the beneficiary or a direct payment to the caregiver.
- Neither Community Fund Ohio nor our Trustee shall act as the employer.
- A personal services contract or related document is not binding on Community Fund Ohio.
- A designated advocate may submit additional documentation such as a letter in support of the distribution if the proposed distribution request does not follow these policies.

Distribution Requests that are likely to be denied:

- Advances for caregiving services.
- Distribution requests that are not supported by documentation.
- Distribution requests that rely solely on a personal services contract.
- Distribution requests for more than 10 hours per week and the beneficiary resides in a long-term care facility or group home.

All of our forms and distribution policies are available on the All Forms page of our website.

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