

Fundraising, Promotion & Events Guidelines for Component Funds

The Delaware Community Foundation (DCF) is grateful for the philanthropically minded individuals and groups associated with our funds who wish to engage in fundraising, events, social media campaigns or other activities related to the fund.

The DCF is happy to assist with these activities to ensure they align with the DCF's mission, values and image and are implemented in accordance with the DCF's Terms and Conditions for Component Funds ("the Terms") (available on the DCF website) and other DCF guidance.

All activities conducted under the auspices of a DCF fund must be reviewed and approved in writing by the DCF prior to any implementation, including accepting donations, making purchases and promoting the activity.

Failure to follow DCF policies and guidelines may result in refusal to approve future activities and/or accept future contributions to the fund.

Activities Requiring DCF Approval

The individual or members of a group engaging in any activity under the auspices of the DCF fund are acting as volunteers of the DCF and must follow instructions provided by the DCF. Volunteers are responsible for the planning, coordination and implementation of the activity, in accordance with all DCF policies, guidelines and instructions.

Prior approval is required for any activity conducted under the auspices of a DCF fund. Activities requiring prior approval include but are not limited to:

- Mailings (print or electronic)
- Online solicitations, including social media, websites, crowdfunding or similar activities
- Receptions and dinners
- Golf outings
- Runs/walks
- Arts or entertainment events
- Auctions
- Award ceremonies
- Conferences

The DCF has sole discretion over its funds and may decline fundholders' requests to conduct certain activities under the auspices of the fund.

Applying to Conduct Activities

The individual leading the proposed activity must complete and submit the appropriate application, including any required attachments, **at least 30 days prior to beginning implementation** (not the date of the activity). The application must include any required documents and be signed by an authorized fund advisor.

The application should be submitted during the initial planning process. Volunteers must not begin engaging in any activity until receiving written approval from the DCF. This includes accepting donations, making purchases and promoting the activity.

The DCF will not be responsible for expenses incurred for activities that were not approved in advance.

The DCF has three types of applications:

- **Event Application** – This application is required for any event, including events to raise money for a fund at the DCF or programmatic events. This application is appropriate for events such as receptions, dinners, silent auctions, golf tournaments and educational programs.
- **Mailing Application** – This application is required for any print or electronic mailing, including those to solicit donations into a fund at the DCF. This application is required whether the expenses related to the mailing are being paid from the fund or donated (paid for) by a third party.
- **Other Activity Application** – This application is required for any activities other than those described above, except for grant applications.* This application is appropriate for activities such as crowdfunding, social media campaigns, websites, or if the fund is named as a beneficiary of an unrelated entity’s event.

*Volunteers applying for grants to DCF funds must coordinate with Michelle Marshall, gift administrator, at mmarshall@delcf.org or 302.504.5227.

Marketing or Promoting the Fund or Related Activities

All print or electronic marketing materials must be reviewed and approved by the DCF prior to distribution. This includes invitations, advertising, websites, programs, solicitations and grant applications. **Materials must be provided to the DCF 10 business days before printing/publication.**

Materials must disclose that the activity is to benefit a fund of the DCF and accurately identify the relationship with the DCF. Examples of appropriate language are:

- “The XYZ Fund at the Delaware Community Foundation”
- “The XYZ Fund is a fund of the Delaware Community Foundation, a 501c3 organization.”
- “The XYZ Fund, a fund of the Delaware Community Foundation, strives to help children and animals in Delaware.”
- “This event benefits the Delaware Community Foundation’s XYZ Fund, which strives to help children and animals in Delaware.”

Materials must **not** say the fund itself is a nonprofit organization, foundation or other independent entity.

Materials may include the DCF logo, but it is not required. For a high-resolution logo, contact Allison Taylor Levine, vice president for marketing and communications, at alevine@delcf.org or 302.504.5226.

Managing Activities

Legal Requirements

Because the DCF is legally responsible for the activities related to its funds, the DCF must secure the appropriate insurance and required licenses or permits, based on all aspects of those activities.

In some cases, venues and other vendors may need to provide their Certificate of Insurance. If any of these documents cannot be secured, all or part of the activity may not be approved by the DCF.

Accepting Money

- All revenue – including but not limited to ticket sales, registration fees and sponsorships – must be received by the DCF through approved channels and clearly indicate what the contribution is for (e.g., sponsorship, registration). **Volunteers must not directly collect money through non-approved platforms, such as EventBrite or website pages, without DCF approval.**
- Checks must be made out to the Delaware Community Foundation with the name of the fund or event clearly noted in the memo/comment.
- The DCF provides receipts directly to donors for tax purpose.
- The fair market value (not actual cost) of any benefit received in return for a contribution reduces the tax deductible amount of the contribution (\$100 ticket - \$40 value of dinner = \$60 tax deductible donation). This information must be disclosed on related materials.
- The cost of a ticket for a raffle or other game of chance is not tax deductible.
- Also see *Gifts to DCF Funds and Fundraising for a Fund* in the Terms.

Paying Expenses

- The DCF must be the signatory on any contracts, agreements, applications or similar documents, including those related to any vendor, contractor/consultant or funder. **Volunteers must not sign such documents and/or represent themselves as agents of the DCF or owners of the activity.**
- The use of any paid consultant/contractor must be discussed with and approved by the DCF in advance.
- All expenses are to be paid by the DCF directly to the vendor. A W-9 for businesses or an I-9 for individuals must be on file prior to payment. In rare situations where this is not feasible, other arrangements must be discussed with the DCF in advance.
- Expenses submitted for payment that exceed the fund balance, were not included in the budget, exceed the budget, or are received more than 30 days after the activity may not be paid.
- All requests for payment of expenses must be approved by an authorized fund advisor.
- Also see *Other Distributions* in the Terms.

For more information, contact Michelle Marshall, gift administrator, at mmarshall@delcf.org or 302.504.5227.