



A CHARITABLE GIVING CAMPAIGN
DESIGNED TO MAXIMIZE DONATIONS THROUGH A MATCHING GRANT PROGRAM

2019

**Rules and Procedures for Participating
Nonprofit Organizations**

Great Fish Challenge Giving Period July 25 – September 13, 2019

Great Fish 5K Color Run and Community Celebration

September 7, 2019

Depot Park, Whitefish

www.whitefishcommunityfoundation.org

About the Great Fish Community Challenge

The Great Fish Community Challenge launched in 2015 as a matching grant program organized by the Whitefish Community Foundation. It is a collaborative fundraiser, designed to encourage mission awareness while raising thousands of dollars to support local nonprofit programs and services. The Great Fish Community Challenge has grown every year since inception, raising over \$6.9 million for over 55 local nonprofits since 2015.

The 2019 campaign will launch July 25 and span seven weeks. With a single gift made to the Whitefish Community Foundation between July 25 and September 13, donors can contribute to any number of local charities participating in the Great Fish Community Challenge. Each participating nonprofit will receive gifts designated to them, as well as an additional percentage match from the Whitefish Community Foundation.

The Whitefish Community Foundation will launch the campaign with \$200,000 in the Great Fish Challenge Match Fund. The match is the backbone of the campaign, and a percentage match will be awarded on the first \$20,000 raised by each nonprofit. We cannot predict the final amount in the match fund, or what the match percentage will be until the end of the campaign.

The significant expenses associated with the Great Fish Community Challenge, including staff support, marketing, administration, and event management (over \$150,000 in 2018), are paid by the Whitefish Community Foundation as a community service. Participating in the campaign together builds camaraderie and mission awareness within our nonprofit community and the community at large, and allows everyone to benefit from lower fundraising costs. Participation in the Challenge is free for nonprofits.

About the Whitefish Community Foundation

The mission of the Whitefish Community Foundation is to enrich the quality of life in the Whitefish area by fostering philanthropy, building endowments, and helping donors and nonprofits benefit our community.

Since 2000, Whitefish Community Foundation funding has supported the hungry, assisted the underserved, built affordable housing, cared for the sick, and enriched our lives through the arts. The Foundation's funding does not come from a single source, donor, or corporation, but from hundreds of individuals and organizations with one thing in common—they all care about Whitefish.

The Foundation serves philanthropists in the Whitefish community by providing optimal tax advantages, responsible investing, and effective grant making. Donors use the Community Foundation's experienced staff to gain insight on community needs and facilitate their giving with prudent due diligence and simplified administration through donor directed grants and donor-advised funds.

Eligibility

To be eligible to participate in the 2019 Great Fish Community Challenge, organizations must:

- Be located in Flathead County, Montana.
- Provide a service or benefit to the residents of the greater Whitefish area.
- Have 501(c)(3) public charity status with the IRS or be a government entity.
 - Educational institutions are not eligible to participate. (Educational institutions are defined as places where people of different ages gain an education, including preschools, childcare, elementary schools, and universities, and excluding places that offer classes in a specific activity, such as music or art)
- Have updated their GuideStar profile to achieve the GuideStar Bronze Level of participation **prior** to submitting their application.
- Have applied for a grant from the Whitefish Community Foundation Community Grant Program in a prior year. Participation in the Community Grant Program allows the Grants Committee to become acquainted with an organization's mission, programs, and needs through their application and a site visit. Priority will be given to organizations who have received a Community Grant.

- Have submitted all required documentation for previous grant awards by the specified deadline.
- Confirm that funds raised will not be used for religious or political programs.
- Not be nonprofits that are sponsored organizations (a sponsored organization is defined as an organization that has a fiscal sponsor from which it receives funds, and the sponsored organization operates under the nonprofit status of the sponsor).
- **Organizations may participate in either the Great Fish Community Challenge or the Give Local Flathead program, but not both. Nonprofits participating in the 2019 Great Fish Community Challenge are not eligible to apply for a Community Grant.**
- Have a designated contact person with a current email address to receive communications from the Whitefish Community Foundation. Internet access is available at the Whitefish Community Library.
- Agree to comply with all the participation requirements, rules, and procedures.
- New organizations applying to the Great Fish Community Challenge for the first time must have attended the January 15th nonprofit meeting in order to apply for the 2019 Challenge.
- Please note: In 2020, returning organizations will have to submit their 2018 signed, and filed Form 990 or 990-EZ when applying for participation in the Great Fish Community Challenge. Thus, if you participate in 2019 (or participated in an earlier year), and you want to participate in 2020, you must file either Form 990 or Form 990-EZ for the 2018 tax year. Organizations applying for the first time to participate in the Challenge will not be required to submit a Form 990 or 990-EZ. Organizations are allowed to use part of the matching grant funds from WCF to help pay for accounting assistance if necessary. The same rule will apply in later years (i.e. returning organizations applying in 2021 must submit a 2019 Form 990 or 990-EZ.) Returning organizations that file only a 990-N (e-Postcard) will not be eligible to apply.

Application

Previous year participation does not guarantee participation in the 2019 campaign. To be considered for participation in the 2019 Great Fish Community Challenge, A COMPLETE APPLICATION INCLUDING ORGANIZATION FINANCIAL INFORMATION, ATTACHED IN THE REQUESTED FORMAT, MUST BE SUBMITTED ONLINE BEFORE 4:00 P.M. MST ON FEBRUARY 28, 2019.

Participation Requirements

Organizations accepted to participate in the Challenge must meet the following mandatory requirements:

- Attend a mandatory kick-off meeting at Whitefish High School multipurpose room on June 18, 2019 at 8:30 a.m.
- Actively participate on one of the Great Fish Community Challenge event committees, and attend committee meetings.
- Promote the Great Fish Community Challenge to internal and external constituents.
- Organize your board members, employees, and volunteers to support and promote the Great Fish Community Challenge.
- Represent your organization at the Great Fish Community Challenge Launch Party at First Interstate Bank on July 25, 2019.
- Host an engaging and interactive booth at the Great Fish Color Run and Community Celebration in Depot Park on September 7, 2019.
- Provide 3 volunteers to assist with the Great Fish Color Run and Community Celebration.
- Attend the October 10, 2019 awards ceremony.

Please note that if you fail to attend the mandatory kick-off meeting you will be ineligible for the match. Failure to meet **any** of the participation requirements will render your organization ineligible to win the Great Fish Award. Failure to host a booth at the Community Celebration will make your organization ineligible to participate in the next year's Great Fish Community Challenge.

Challenge Grants Structure

The Great Fish Community Challenge grant structure was developed to allow all organizations to benefit fairly from the match.

The \$5,000 Minimum: Nonprofits must raise at least \$5,000 to qualify for the match. No match will be awarded if the nonprofit does not raise the \$5,000 minimum.

The \$20,000 Cap: Participating nonprofits receive all gifts designated to the organization. The matching grant will be calculated on the first \$20,000 of eligible contributions (defined below) designated to the organization during the campaign.

The Match Percentage: The match percentage depends on the ratio of the total amount raised in the Great Fish Challenge Match Fund compared to the amount of eligible designated contributions raised by participating nonprofits during the campaign.

Use of Funds: Use of donor contributions and matching funds is restricted to local, non-religious programs. An organization cannot grant matching funds to another participating organization and must use the funds for the purposes stated in their application, as approved by the Whitefish Community Foundation Board of Directors.

RULES AND PROCEDURES

Please read and follow the rules for the benefit of your organization and fellow participating nonprofits. The rules enable the Community Foundation to process over 4,000 gifts for over 50 organizations during the campaign, while keeping the Great Fish Community Challenge free for participating nonprofits. For this reason, not following the rules may disqualify an organization from participating in the Great Fish Community Challenge, affect future participation in the campaign, and/or result in forfeiture of the Great Fish Challenge Matching Grant.

- All organizations must act ethically and honestly, with mutual respect to promote community harmony.
- Funds may not be used for religious or political purposes.
- Funds raised through the Great Fish Community Challenge may only be used to **benefit programs based in Flathead County, Montana**. All programs funded by donations to the Great Fish Community Challenge must take place in Flathead County, Montana.
- Non-tax-deductible contributions may not be channeled through the Great Fish Community Challenge. (See ineligible contributions on page 5)
- Only official donation forms are allowed. An official electronic version of the donation form may be found on our website on July 25, 2019. The **official donation form may not be recreated**, but it may be copied.
- Organizations may not send box holder mailings, postal patron mailings, or solicitations through a purchased mailing list. Door-to-door solicitations and cold-calling telephone solicitations are prohibited. Organizations may only conduct targeted solicitations related to the Great Fish Community Challenge through their organization database.
- Soliciting multiple donations from a single family is discouraged. Soliciting donations from multiple members of one family to win an incentive grant is prohibited. The spirit of the Great Fish Community Challenge is to make it easy for donors to make one gift and benefit multiple charities.
- All contributions received as part of the Great Fish Community Challenge are subject to the Whitefish Community Foundation's variance power. ****See below**
- Organizations **must not** provide a tax receipt for contributions made through the Great Fish Community Challenge. Because donations are made to the Whitefish Community Foundation, it is the Community Foundation's legal responsibility to provide tax receipts to donors.
- In response to donor concerns, organizations are discouraged from mailing entry or donation forms to Flathead County addresses. Whitefish Community Foundation will mail a donation form to area households. Official entry and donor forms will be available at local banks, businesses, participating nonprofits, the Whitefish Chamber of Commerce, at the Whitefish Community Foundation office, and on the Foundation's website.
- Participation in the Great Fish Community Challenge does not guarantee that organizations will receive funds from the campaign. Organizations receive donations designated to them plus the percentage match if they have met all requirements.

- Organizations must not provide any goods or services in exchange for a donor's contribution through the Great Fish Community Challenge.
- **Cash donations** must be given to Community Foundation staff **directly by the donor**, and must be accompanied by a donation form completed by the donor. Cash donations collected by organizations at events and delivered to the Community Foundation will not be accepted into the Great Fish Community Challenge, even if they are accompanied by an official donor form. These donations are the property of the organization and as such, can be accepted by the organization as gifts outside of the Great Fish Community Challenge.
- Organizations are encouraged to acknowledge all donations with personal thank you notes as appropriate.
- To establish a strong partnership, participating nonprofits are encouraged to use the Great Fish Community Challenge logo in their advertising during the giving period (See logo usage on page 7).

****Variance Power.** Funds raised through the Great Fish Community Challenge are subject to the variance power described in Treas. Reg. 1.170A-9(f)(11)(v)(B)(1), as amended from time to time. Pursuant to the variance power, the Board shall have the power to modify any restriction or condition on the distribution of funds for any specified charitable purpose or to specified organizations, if in their sole judgment (without the approval of any advisor, trustee, custodian, or agent) such restriction or condition becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the community or area served by the Community Foundation.

Contributions

Contributions for the Great Fish Community Challenge will be accepted July 25, 2019 through September 13, 2019

Organizations are responsible for soliciting donations on their behalf. A unique aspect of the Great Fish Community Challenge is that donors can make contributions to several organizations with **only one check** and thus receive a single tax receipt.

- Nonprofits will receive 100% of gifts designated to them by check or cash, regardless of the amount. Donations received via credit card will be subject to a 2.9% credit card fee. This fee covers the cost incurred to process the credit card transaction, and does not include any additional fees charged by the Whitefish Community Foundation. 100% of all designated gifts received by check, cash, and credit card up to the first \$20,000 raised by each organization will be eligible for the match. The 2.9% credit card processing fee will be subtracted from the total credit card gifts designated to the organization after the match has been calculated at the end of the campaign.
- Credit card transactions must be a minimum of \$25.
- The minimum eligible donation amount per donor to be entered in the incentive grants drawing at the Launch Party and Color Run is \$25 per organization.

Eligible contributions include the following:

- Checks made out to the Whitefish Community Foundation accompanied by an official donor form.
- Cash gifts will be accepted if they are given to Community Foundation staff directly by the donor, and are accompanied by an official donation form completed by the donor. **Cash donations collected by organizations and delivered to the Community Foundation will not be accepted**, even if they are accompanied by an official donor form. These donations are the property of the organization and can be accepted by the organization as gifts outside of the Great Fish Community Challenge.
- Online credit card gifts can be made at www.whitefishcommunityfoundation.org
- Noncash gifts (e.g. gifts of stock or other assets) may be eligible. Contact the Whitefish Community Foundation directly.
- For contributions by payroll deduction, contact the Whitefish Community Foundation directly.
- Corporate matching gifts.
- To qualify for matching funds, the Community Foundation must receive the contribution on or after July 25, 2019 and on or before September 13, 2019.

Ineligible contributions include the following:

- Gifts in exchange for goods and services:
 - Event proceeds, such as funds raised through raffles, collections, drawings, auctions, dinners, or other events
 - Fees, such as admission, registration, tickets, event, uniform, or any other type of non-tax-deductible payment
 - Membership dues
 - Sales of goods or services
 - Tuition
 - Sponsorships
- Cash donations that are not made directly by the donor to a Whitefish Community Foundation staff member and accompanied by an official donor form
- Pledges from walk-a-thons, bike-a-thons, swim-a-thons, etc.
- Gifts made to fulfill volunteer service hours required by the organization
- Donations to the Whitefish Community Foundation to fulfill a pledge agreement with the designated organization
- Donations received before July 25, 2019, or after September 13, 2019

Contribution Reporting

The Whitefish Community Foundation will provide contribution information to participating organizations through a web-based portal at www.whitefishcommunityfoundation.org. Upon acceptance to the Great Fish Community Challenge, two Fund Advisors approved in writing by the participating nonprofit organization's board of directors, will be given instructions, a username, and password for the portal. The online portal will include donor names, addresses, and contribution amounts given to the Whitefish Community Foundation on behalf of the organization.

- Organizations are given free, unlimited online access to review contribution activity.
- The Whitefish Community Foundation will only provide password information and assistance to the designated Fund Advisors.
- Information can be accessed 24 hours a day from any computer with internet access.
- Donations must be received by September 13 to be eligible to be matched. Donations received between September 14 and October 1 will be included in the final award check but will not qualify for the match.
- Entry of contributions and adjustments may continue through October 1, 2019. Contributions made after October 1 are considered donor designated grants and will be charged a 10% administrative fee by the Community Foundation to cover administrative costs and staff time. Donations after October 1 will be mailed out to designated nonprofit after gifts are reconciled.

Great Fish Color Run and Community Celebration

- Each participating nonprofit must have a 10 x 10 booth at the Community Celebration and Color Fun Run in Depot Park on September 7.
- Booth location will be determined by the Whitefish Community Foundation.
- Booth drop off and set up takes place from 7:00 a.m. until 9:00 a.m.
- The Great Fish Color Run events start at 10:00 a.m. A free lunch will be served starting at 11:00 a.m. for the public.
- Bring everything needed for display, including tents, tables, chairs, table covers, signs, easels, printed information, etc. Due to space limitations, tent space will be no larger than 10 x 10 feet. Please note the City of Whitefish does not permit stakes in Depot Park. Tents can be easily weighted down with 5 gallon water buckets and ropes or bungee cords.
- You are responsible for unloading everything you bring. Be sure to recruit enough help.
- No power is available in the booth area.
- The booths are intended to be an educational opportunity for the community, however, nonprofits may sell items related to their organization (i.e. hats, t-shirts, cups).

- If donors wish to give to your organization at the Community Celebration, please direct them to the Donations and Information tent where they can complete an official donor form and make their gift. Gifts made at the Community Celebration may be eligible for additional incentive grants.
- You can give away pre-packaged, non-perishable food at your booth. Please contact the Flathead County Public Health Department for information on serving food to the public. Please provide a trash receptacle if you have food or other disposable items. Use of recycled materials is strongly encouraged and appreciated.
- Plan for inclement weather. A rain fly, paperweights, etc. are recommended.
- Following the Community Celebration, please clear your area and leave the park exactly as you found it.

Grant Report

The grant report for the 2019 Great Fish Community Challenge will be due in September 2020, and must be submitted online at www.grantinterface.com/Home/Logon?urlkey=wcf. Organizations that fail to submit a grant report for the Great Fish Community Challenge will not be eligible to participate in future Great Fish Community Challenges. Matching funds must be spent within 18 months of the issuance of the grant check or returned to the Whitefish Community Foundation. The grant report is used to ensure that organizations spend their grant in accordance with their use of funds statement. The grant report is also used to show the community impact of the Great Fish Community Challenge to the public, donors, and the media.

Logo Usage and Marketing Information

To encourage consistency in marketing the Great Fish Community Challenge and to help donors connect organizations with the challenge grant opportunity, the Whitefish Community Foundation provides participating organizations with the Great Fish Community Challenge logo. The Foundation will email the logo to the organization's contact person, or it can be downloaded at www.whitefishcommunityfoundation.org.

The Great Fish Community Challenge logo may not be altered or changed and must always appear upright. Color substitutions are not allowed.

Logo usage

The Great Fish Community Challenge logo can be used in a variety of applications, including, but not limited to:

- Newspaper, magazine, and television advertisements
- Mass emails, websites, and social media
- Newsletters, postcards, brochures, signs, and solicitation letters

Great Fish Community Challenge Name Usage

Acceptable references to the Great Fish Community Challenge include:

- 2019 Great Fish Community Challenge
- Great Fish Community Challenge
- 2019 Great Fish Community Challenge and Great Fish Color Run
- Great Fish Community Challenge and Great Fish Color Run
- Great Fish Color Run and Community Celebration

Unacceptable references to the Great Fish Community Challenge include, but are not limited to:

- Great Fish
- Great Fish Challenge
- 2019 GFCC
- GFCC
- 2019 GFCC and Fish 5K Color Run
- GFCC and Fish 5K Color Run

Whitefish Community Foundation Is Your Partner

If your nonprofit is accepted to participate in the Great Fish Community Challenge, please refer to the Whitefish Community Foundation as the sponsor of the Challenge. The Great Fish Community Challenge is not a nonprofit entity and is not the sponsor.

It is permissible to state

- The Great Fish Community Challenge is brought to you by Whitefish Community Foundation
- The Great Fish Community Challenge is a program of the Whitefish Community Foundation
- Nonprofit is a participant in the Great Fish Community Challenge

It is not permissible to state

- The Great Fish Community Challenge is brought to you by nonprofit
- The Great Fish Community Challenge is a program of nonprofit
- Nonprofit is a partner in the Great Fish Community Challenge
- Nonprofit is a partner with the Great Fish Community Challenge

Nonprofit Special Events Marketing the Great Fish Challenge

Participating nonprofits shall not use the name(s) or the logo in any manner that states or implies that the Whitefish Community Foundation created, approved, sponsored, or is any way responsible for the participating nonprofit's advertisements, letters, communications, or events. The participating nonprofit is responsible for, and will indemnify and hold the Community Foundation, its employees, agents, and directors harmless from and against any actions, liabilities, losses, judgments, costs, expenses, suits, or other claims, including reasonable attorneys' fees and costs arising from or in any way related to, the participating nonprofit's use of the name(s) or logo.

Promotion and Marketing Reminders

In promotional and solicitation materials, organizations are encouraged to include the following:

- The Great Fish Community Challenge giving period is July 25 through September 13, 2019.
- The Community Celebration and Great Fish Color Run will be held at 9:00 a.m. on September 7, 2019 at Depot Park.
- The awards ceremony will be held on October 10, 2019.
- Organizations receive contributions designated to them. They also receive a Great Fish Challenge Matching Grant, based on the first \$20,000 they raise.
- The match percentage awarded will depend on the ratio between the total amount raised in the Great Fish Challenge Match Fund and the total amount of eligible designated contributions raised by participating nonprofit organizations.
- The Whitefish Community Foundation will launch the Match Fund with \$200,000, inspiring our community to give and making the Great Fish Community Challenge possible.
- Contributions on behalf of participating nonprofits must be made directly to the Whitefish Community Foundation.
- Donors are encouraged to give to more than one organization with a single gift to the Community Foundation.

Great Fish Award

The Great Fish Award will be presented at the conclusion of the Great Fish Community Challenge. The recipient will be an organization that participated in the Challenge, demonstrated commitment, enthusiasm, and creativity during the Challenge, and showed strong support for the Challenge and the Color Fun Run. The total number of donors, amount of money raised, willingness to participate in Challenge events, and the organization's interaction with other nonprofits in the spirit of the Great Fish Community Challenge will be considered. This award comes with a \$5,000 grant.

Whitefish Community Foundation Staff

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- Haley Craven, Administrative Assistant, admin@whitefishcommunityfoundation.org
- Linda Hobbs, Special Projects, whitefish@whitefishcommunityfoundation.org

Additional Questions? Look Online:

www.whitefishcommunityfoundation.org

*Great Fish Community Challenge is supported by the generosity of the
local community and brought to you by:*



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