



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

2018

**Rules and Procedures for Participating
Nonprofit Organizations**

Great Fish Challenge Giving Period July 26 – September 14, 2018

Great Fish 5K Color Run and Community Fair

September 8, 2018

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 Challenge has grown every year since inception, raising over \$1.1 million for 32 local nonprofits in 2015, over \$1.4 million for 40 nonprofits in 2016, and over \$2.0 million for 45 nonprofits in 2017.

The 2018 Challenge will launch July 26 and span seven weeks. With a single gift made to the Whitefish Community Foundation between July 26 and September 14, 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 significant expenses associated with the Great Fish Community Challenge, including staff support, marketing, administration, and event management (over \$100,000 in 2017), 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.

The Whitefish Community Foundation will launch the Challenge with a minimum of \$200,000 in the Great Fish Challenge Match Fund. The match is the backbone of the Challenge 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 Challenge.

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 Challenge will culminate with a community celebration and 5K fun run, known as the Great Fish Color Run, on September 8 in Depot Park.

The Whitefish Community Foundation will announce the match and award the grants at a media event October 18.

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 your 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 Great Fish Community Challenge 2018, 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
- Have received a Whitefish Community Foundation Community Grant in the past. 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
- If they have participated in previous Great Fish Challenge campaigns, complied with the rules, and submitted a Great Fish Challenge Grant Report **by February 9, 2018**
- 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**
- 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

Application

PREVIOUS YEAR PARTICIPATION DOES NOT GUARANTEE YOUR PARTICIPATION IN THE 2018 CHALLENGE. TO PARTICIPATE IN THE 2018 GREAT FISH COMMUNITY CHALLENGE, THE ORGANIZATION MUST TIMELY SUBMIT A COMPLETED APPLICATION TO PARTICIPATE IN THE GREAT FISH COMMUNITY CHALLENGE. APPLICATIONS MUST BE SUBMITTED TO THE WHITEFISH COMMUNITY FOUNDATION BEFORE 4:00 P.M. MST ON FEBRUARY 28, 2018.

Participation Requirements

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

- Attend a mandatory kick-off meeting at Whitefish High School on June 28, 2018 at 8:30 AM.
- Actively participate on one of the Great Fish Community Challenge event committees, and attend any committee meetings or mandatory Challenge 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 The Wave on July 26
- Host an engaging and interactive booth at the Great Fish Color Run and Community Celebration on September 8, 2018.
- Provide 3 volunteers to assist with the Great Fish Color Run and Community Celebration
- Attend the October 18, 2018 awards ceremony

RULES AND PROCEDURES

Failure to follow any of the rules or procedures listed below may disqualify an organization from participating in the Great Fish Community Challenge, affect future participation in the event, and/or result in the forfeiture of match dollars.

General Rules and Procedures

- All organizations must act ethically and honestly, with mutual respect to promote community harmony.
- Funds may not be used for religious or political purposes.

- All 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 Great Fish Community Challenge. (See ineligible contributions on page 6).
- Only official donation forms are allowed. An official electronic version of the donation form can be found on our website after July 26, 2018. The **official donation form may not be recreated**. It may be copied. (See contributions on page 6).
- 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 donor is discouraged. Soliciting multiple donations from a single donor to win an incentive grant is prohibited. The spirit of the Great Fish 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*.
- Organizations **must not** provide a tax receipt for contributions made through the Great Fish Community Challenge. As donations are made to the Whitefish Community Foundation, it is the Community Foundation's legal responsibility to provide tax receipts to donors.
- Organizations are encouraged to acknowledge all donations with personal thank you notes as appropriate.

***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.

- In response to donor concerns, organizations are discouraged from mailing entry or donation forms to Flathead County, Montana 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, the Tuesday Farmer's Market in downtown Whitefish, 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 event. Organizations receive donations designated to them plus the percentage match.
- The Foundation will announce the match percentage and give final award checks at the MANDATORY October 18, 2018 awards party.
- All Great Fish Community Challenge checks must be picked up at the awards party. Failure to pick up your check will result in a forfeiture of the match.
- Organizations must not provide any goods or services in exchange for a donor's contribution through the Great Fish Community Challenge.
- **Organizations must not collect contributions to be pooled and delivered to the Whitefish Community Foundation. Donors should mail or deliver their contributions directly to the Whitefish Community Foundation. Violation of this fundraising procedure could result in funds not counted toward the match.**
- **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 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 Challenge.

- 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](#)).

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 \$5,000 minimum is not met.

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

The Match Percentage: The match percentage, announced at the awards party on October 18, 2018, 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 during the campaign by participating nonprofits.

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 the Use of Funds Statement in their 2018 application.

Great Fish Color Run and Community Celebration

- Each participating nonprofit must have a 10 x 10 booth at the Community Celebration on September 8, 2018 located at Depot Park.
- Booth location will be determined by the Whitefish Community Foundation
- Booth drop off and set up takes place from 7:00 AM until 9:00 AM.
- The Great Fish Color Run events start at 10:00 a.m. A free lunch will be served starting at 11:00 AM 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.
- 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 an additional match.
- 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.

Contributions

**Contributions for the Great Fish Community Challenge will be accepted
July 26, 2018 through September 14, 2018.**

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.

- **New in 2018: 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 2.7% 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 2.7% 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 donation amount per donor eligible 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 must be made out to the Whitefish Community Foundation and accompanied by an official donor form.
- Cash gifts are discouraged, but will be accepted in the Challenge 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 Challenge.
- Online credit card gifts can be made at www.greatfishchallenge.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 26, 2018 and on or before September 14, 2018.

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.
- Donations to the Whitefish Community Foundation to fulfill a pledge agreement with the designated organization
- Donations received before July 26, 2018, or after September 14, 2018

Contribution Reports

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, the contact person for an organization will be given instructions and a username and password for the portal. The report includes donor names, addresses and contribution amounts given to the Whitefish Community Foundation on behalf of an 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 contact person.
- Information can be accessed 24 hours a day from any computer with internet access.
- The contact person is responsible for distributing the password as appropriate.
- Reports will be available only via the internet. The Foundation will not give print, phone, or e-mail reports.
- Entry of contributions and adjustments may continue through October 1, 2018. 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.

Grant Report

The grant report for the 2018 Great Fish Community Challenge will be due in early 2019 and must be submitted online at www.whitefishcommunityfoundation.org. Organizations that fail to submit a grant report for the Great Fish Community Challenge will not be eligible for the 2019 Great Fish Community Challenge. 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 use the grant from the 2018 Great Fish Community Challenge 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 be used only from July 26, 2018 through September 14, 2018. It can be reproduced in black and white or color. The 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:

- 2018 Great Fish Community Challenge
- Great Fish Community Challenge
- Great Fish Challenge
- 2018 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:

- 2018 GFCC
- GFCC
- 2018 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 you can refer to the Whitefish Community Foundation as your partner.

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 Whitefish Community Foundation
- Nonprofit is a participant in the Great Fish Community Challenge
- Nonprofit is a partner with Whitefish Community Foundation

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.

Information Reminders

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

- The 2018 Great Fish Community Challenge giving period is July 26 through September 14, 2018.
- The Community Celebration and Great Fish Color Run will be held at 9:00 a.m. on September 8, 2017 at Depot Park.
- 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, announced at the award party on October 18, 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 Challenge Match Fund possible.
- Contributions on behalf of participating nonprofits must be made directly to the Whitefish Community Foundation and must be accompanied by an official donor form.
- Donors are encouraged to designate more than one organization with a single gift.

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 and 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 Challenge will be considered. This award comes with a \$5,000 grant.

Whitefish Community Foundation Staff

- Linda Engh-Grady, President, linda@whitefishcommunityfoundation.org
- Daria Perez, Vice President, Finance and Operations, daria@whitefishcommunityfoundation.org
- Lynnette Donaldson, Donor Relations, lynnette@whitefishcommunityfoundation.org
- Kayla Nickells, Marketing and Events Coordinator, kayla@whitefishcommunityfoundation.org
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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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