



community foundation

St. Clair County

Fund Raising  
&  
Special Events  
Policies and Procedures  
10/9/06 revised 4/21/14

### Background

The Community Foundation of St. Clair County is comprised of over 170 different endowment funds that engage hundreds of donors, volunteers and partners in a united effort to improve the quality of life in St. Clair County. These endowed funds are permanent capital – meant to last on in perpetuity – while using available earnings and investment growth to provide annual grants, awards and/or scholarships.

Most of these funds have been created through single gifts from a donor or donors, often in memory of a loved one who has passed away, or to support a particular nonprofit organization or area of interest.

Growing in popularity however are what we consider “public funds” that thrive through the passion and dedication of donors, volunteers and the general public. These funds often receive gifts from numerous individuals, organizations, businesses and other foundations. The *Citizens for St. Clair Fund* was the first such public fund.

This document is intended to provide these funds and their respective donors and/or volunteers, with proper guidelines and procedures so that fund raising efforts are consistent with the Foundation’s overall philosophy and mission, and abide by applicable laws.

### Fund Raising Philosophy

The primary strength of community foundations is their ability to help meet the lifetime philanthropic objectives of donors. Community foundations primarily serve donors interested in making significant, lifetime gifts that in turn support programs, projects and organizations of interest to the donor(s).

The most common and cost-effective method of fund raising is through planned gifts such as wills, trusts, annuities and other gift vehicles that facilitate proper estate planning. The Community Foundation of St. Clair County strongly believes in promoting “lifetime” gifts to our donors and their financial or legal advisors. Like most community foundations, this is the Community Foundation’s major fund raising emphasis.

The Community Foundation generally prefers not to compete with other nonprofit organizations in the area of fund raising via special events. Such activities traditionally are the most expensive (as a percentage of funds raised) and time consuming methods of fund raising. However, when treated as “friend raising” and a donor cultivation or awareness tool, special events can and do play an important role.

### Policies & Procedures

Volunteers, donors and partnering organizations will be required to adhere to the following policies and procedures for fund raising activities that benefit endowed funds at the Community Foundation.

For the purposes of this document, there are two classifications of events:

- A. Those organized under the Foundation’s name, direction and supervision. Examples of these types of events include;
  - a. Annual Dinners
  - b. Back to School
  - c. 100 Women
  - d. 100 Men
  
- B. Those organized and sponsored by other external organizations, groups and/or businesses *to benefit* the Foundation or a particular fund. Examples of these types of events include;
  - a. James Wilhelm Memorial Golf Outing
  - b. Algonac/Clay Cinco de Mayo dinner
  - c. Targeted Direct Mail campaigns for the St. Clair County Library Endowment Fund

#### A. Directly Organized Events

- 1. By design, the Foundation will be very selective in the number and scope of events it organizes and sponsors directly
- 2. Characteristics of these events include:
  - a. The Foundation directly pays invoices, signs contracts and coordinates event registration through its offices.
  - b. The Foundation uses its own mailing lists for mailings and manages the process of invitation printing, circulation and related marketing and promotional activities.
  - c. Checks are made payable directly to the Community Foundation.
- 3. On an annual basis, usually at the beginning of each new year, the Foundation’s board shall review and approve a list of all directly organized fund raising events. Any of these events that include alcohol will require appropriate licenses, permits and extra liability insurance.
- 4. Wording referencing eligible charitable tax deductions requires written review by Foundation staff.

#### B. Externally Organized Events

- 1. Representatives of individual funds within the Community Foundation should contact Foundation staff at the earliest possible time to discuss event logistics, policies and procedures.
- 2. Event approval may be obtained from appropriate Foundation staff.
- 3. All event related contracts must be obtained, approved and signed by the event sponsor or organizing entity.

4. Use of the Community Foundation's logo and/or name in printed materials such as flyers, advertisements, tickets and/or event brochures requires advance written approval by the Foundation President or vice president.
5. Wording or phrases used to indicate or make reference to the charitable gift portion of an event ticket or sponsorship level requires written approval by the Foundation president or vice president.
6. Marketing materials may not imply that this is a Community Foundation event.
7. Gambling and/or raffle licenses may not be applied for in the Foundation's name nor will the Foundation cover the costs of such licenses or applications.
8. The Foundation from time-to-time will provide financial support to help offset the costs of the event. Such agreements must be made in writing, with requests submitted to the Foundation at the earliest possible time.
9. The Foundation may also be able to assist with the design of related marketing materials, as well as media and promotional opportunities
10. The Foundation cannot reimburse donors for expenses incurred in relation to a fund raising event if the event proceeds benefit a donor advised fund of the Community Foundation
11. Event registration, tickets sales and related logistics must usually be coordinated through an outside business or organization unless other arrangements have been made with the Community Foundation.
12. Occasionally, the Foundation board may grant approval for externally organized events to secure appropriate liquor licenses, permits and liability insurance in the Foundation's name. Such costs must be factored into the event's budget and the Foundation must be reimbursed for such costs.