



Donor Initiated Fundraising and Marketing Policy

POLICY STATEMENT

This policy serves to guide The Alaska Community Foundation (the “Foundation”) staff and Foundation fund holders/advisors when fund holders/advisors, donors, Foundation supporters, or local volunteers seek to plan fundraising events, activities, solicitations, or promotions for funds held at the Foundation.

PURPOSE & SCOPE

The Foundation recognizes that many fund holders, donors, Foundation supporters, and local volunteers will want to grow funds in size and impact and encourages fundraising for this purpose. Foundation staff will help fund holders/advisors, donors, Foundation supporters, or local volunteers navigate this process. Coordination of fundraising and marketing efforts with Foundation staff is essential to ensure all parties comply with Foundation Board policies, IRS regulations, and understand the scope of authority.

This policy does not apply to nonprofit organizations conducting their own fundraising and contributing the net proceeds to their fund at the Foundation.

SOLICITATIONS & RECEIPTS

Direct mail, personal, and online solicitations of gifts to funds at the Foundation are permitted under the following guidelines.

1. Prior to activities, submit a written fundraising proposal (Attachment I) and all proposed materials to the Foundation VP of Programs & Grants for approval at least two weeks in advance of the proposed event date.
2. In general, the Foundation’s logo is not to be used for approved fundraising events, activities, and solicitations **unless express permission is granted** and guidelines are provided by Foundation staff.
3. Use of the Foundation’s EIN is prohibited without prior written approval by the Foundation VP of Programs & Grants This includes, but is not limited to, activities and programs such as grant applications and Pick.Click.Give.
4. Fundraising materials should direct the donor(s) to make their checks payable to “The Alaska Community Foundation” with the <Name of Your Fund>” in the memo line. Checks should be mailed directly to the Foundation. Cash donations must be submitted with the name of the fund

indicated and the donor information including name, address, and phone number. Cash donations without this information will be processed as anonymous.

5. Directing donors to the Foundation website www.alaskacf.org or specific fund page is an option under these approved circumstances:
 - a. A fund has its own website and links directly to their fund donation page on the Foundation website.
 - b. A fund is held at ACF by a fundholder who has a website for their business (for profit or not for profit) and provides a link to their specific fund page on the Foundation website.
6. Agency and Field of Interest funds cannot typically be used for fundraising expenses. Please check with Foundation staff in advance if you are seeking to submit a grant recommendation from your fund to cover fundraising expenses.

FUNDRAISING ACTIVITIES

Activities such as fundraising dinners, auctions, conferences, fairs, and merchandise sales must be conducted under the fiscal guidance of the Foundation. Thus, the same guidelines apply as above, plus these additional policies as well:

1. Any portion of the fundraising proceeds that results from the provision of goods or services (excepting auction items but including dinners, booths, conferences, fairs, etc.) to the donor is not tax deductible and must be identified and valued prior to the event (called “quid pro quo” under IRS rules). If it is a ticketed event, the non-deductible value of the ticket price must be disclosed on the face of the ticket. The Foundation will not provide receipts for auction items purchased at events or any in-kind donations.
2. The Foundation will provide a receipt to donors who give to Foundation funds. Fund holders are encouraged to thank their donors personally but not provide tax-deductible receipts. The Foundation will only provide receipts to the individual or organization whose name and address information appears on the form of payment used for the donation. Per IRS regulations, the Foundation is not obligated to receipt gifts of less than \$250.
3. Event Insurance must be provided by the party doing the fundraiser unless the Foundation agrees in advance, in writing, that no insurance is required. Insurance coverage must be reviewed with the Foundation VP of Programs & Grants two weeks prior to fundraising activities.
4. The event must comply with the State of Alaska Charitable Solicitations Act.
5. It may be necessary for the Foundation to charge an additional administrative fee if a fundraiser requires significant staff time or resources. If fund advisors have any questions, feel free to call the Foundation office to discuss this in advance.

PROMOTIONAL ACTIVITIES

Activities such as publicly stating “a portion of annual profits will be donated to the Foundation or a fund at the Foundation” require a written agreement with the Foundation which include guidelines for using the Foundation name and linking to the website.

Cobranding or cause marketing with the Foundation is typically not allowed. These partnerships are when a commercial brand (or donor or Foundation supporter) requests to partner with the Foundation and raise money by promoting a product or service. These types of promotions are often a product or service where a “percent donation when purchased” is donated back to the Foundation.

GRANTS

A grant is a gift or contribution bestowed by a government entity, corporation, or other organization for a specified purpose that is conditional upon certain qualifications as to use, specified standards, or a proportional contribution by the grantee or other grantor(s). Grants usually require compliance reporting by the grantee to the grantor. Some additional guidelines to grants are as follows:

1. The Foundation is the legal entity for the funds and is therefore the grantee.
2. Organizations and individuals are prohibited from using the Foundation's EIN without prior written approval from the Foundation VP of Programs and Grants.
3. Proposal development should be discussed with the VP of Programs and Grants well in advance before the proposal is due.
4. Requests to submit a grant application on the Foundation's behalf for a particular fund must be approved by the Foundation's President/CEO at least two weeks prior to the application deadline.
5. The Foundation's President/CEO must sign all original grant applications and agreements.
6. Fund advisors must update the Foundation in writing at least two weeks in advance on all progress and final report submissions.
7. Additional administrative fees may be charged to the fund if significant staff time is needed for processing or reporting.
8. Grant reports are the responsibility of the fund advisor(s) but will often need to be submitted by Foundation staff.
9. The Foundation may refuse grants that do not comply with these guidelines or if the Foundation determines it is in conflict with other requests.

POLICY ADOPTION, REVIEW, AND REVISION HISTORY

Policy: Donor Initiated Fundraising Policy

Date	Action taken	Comments
2012.08.09	Approved by the Board	
2015.02.05	Approved by the Board	
2017.08.15	Approved by the Board	
2019.11.13	Approved by Board	
2022.02.23	Approved by Board	Operations Updates and Cobranding/Promotion Addressed, legal review

Next Bi-Annual Review Date: February 2024

ATTACHMENT 1

FUNDRAISING PROPOSAL



Fund Name: _____

Date of Event: _____ Fundraising Event Name: _____

Description of the Event:

Event Budget (supplies, catering, venue, professional fundraiser/event coordinator, insurance, event waivers, other):

Payment Plan for Goods and Services:

Experience With This Type of Fundraising:

Insurance Provider (copy attached) _____

Number of Attendee's Expected: _____

Fundraising Goal (net) \$ _____

Contact Person: _____

Email: _____

Phone Number: _____

Best Time/Way to Be Contacted:

Staff Use Only Below Line

Date: _____

Reviewed By: _____

Approved

Not Approved

Insurance Required: Yes

No