



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

2022

**Rules and Procedures for Participating
Nonprofit Organizations**

Great Fish Community Challenge Giving Period

August 4 – September 16, 2022

Great Fish 5K Fun Run and Community Celebration

September 10, 2022

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 Whitefish Community Foundation. It is a collaborative fundraiser, designed to encourage mission awareness while raising millions of dollars to support local nonprofit programs and services. The Great Fish Community Challenge has grown every year since inception, raising over \$17 million for 75 local nonprofits since 2015.

The 2022 campaign will launch August 4 and span six weeks. With a single gift made to Whitefish Community Foundation between August 4 and September 16, donors can contribute to any number of local charities participating in the Great Fish Community Challenge. Each participating nonprofit will receive contributions designated to it, and an additional percentage match from Whitefish Community Foundation if the organization raises at least \$10,000 in the campaign.

Whitefish Community Foundation will launch the campaign with \$300,000 in the Great Fish 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 that raises at least \$10,000 in the campaign. We cannot predict the final amount in the match fund, or what the match percentage will be until the end of the campaign.

Whitefish Community Foundation pays the significant expenses associated with the Great Fish Community Challenge, including staff support, marketing, administration, and event management (\$285,000 in 2021) as a community service. Participating in the campaign together builds camaraderie and mission awareness within our nonprofit community and the community at large. Participation in the Challenge is free for nonprofits.

About Whitefish Community Foundation

Our mission: Whitefish Community Foundation is dedicated to fostering philanthropy, building endowments, and helping donors and nonprofits benefit our communities.

Since 2000, Whitefish Community Foundation funding has supported the hungry, assisted the underserved, supported education, 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 the Flathead Valley.

The Foundation serves philanthropists in our communities by providing optimal tax advantages, responsible investing, and effective grant making. Donors use the Community Foundation's experience 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 2022 Great Fish Community Challenge, organizations must meet the following criteria:

- Provide a service or benefit to the residents of Flathead County.
- Have established 501(c)(3) public charity status with the IRS or be a government entity.
- Not be operating under a fiscal sponsorship. (A sponsored organization operates under the EIN of another 501(c)(3) nonprofit organization)
- Have updated their GuideStar (recently rebranded as Candid) profile to achieve at the minimum the GuideStar Bronze Level (Candid Bronze Seal of Transparency) **prior** to submitting their application.
- Have submitted all required documentation for previous Foundation grant awards by the specified deadlines.
- Confirm that funds raised will not be used for programs promoting a religious doctrine or political agenda.
- Agree to comply with all the participation requirements, rules, and procedures.
- Have previously participated in a Whitefish Community Foundation grant program. Applying for a grant allows the Grants Committee to become acquainted with an organization's mission, programs, and needs. Priority will be given to organizations that have participated in the Community Grant Program.

- New organizations applying to participate in the Great Fish Community Challenge for the first time must have attended the January 27, 2022 nonprofit meeting to apply for the 2022 campaign.
- Returning organizations will upload their 2020 signed and filed Form 990 or 990-EZ when applying for participation in the Great Fish Community Challenge. Thus, if you participate in 2022 (or participated in an earlier year), and you want to participate in 2023, you must file either Form 990 or Form 990-EZ for the 2021 tax year. **Organizations applying to participate in the campaign for the first time will not be required to submit a Form 990 or 990-EZ.** Organizations may use part of their Great Fish Matching Grant to help pay for accounting assistance. The same rule will apply in later years (i.e., returning organizations applying in 2023 must submit a 2021 Form 990 or 990-EZ.) **Returning** organizations that file only a 990-N (e-Postcard) are not eligible to apply.
- Please note: In addition to meeting the other criteria for participation, participating nonprofits must be at least one of the following:
 1. An organization that predominantly works in or serves Flathead County, MT
 2. An official Flathead County, MT chapter in good standing of a state/regional/national organization, with a board or local advisory board comprised predominantly of Flathead County, MT residents
 3. A state organization with Flathead County, MT representation on the board; at least one paid employee whose responsibilities are predominantly comprised of program work in Flathead County, MT; and dedicated office space in Flathead County, MT
 4. A regional/national organization, with a board or local advisory board comprised predominantly of Flathead County, MT residents
- Whitefish Community Foundation will not fund projects/programs that duplicate services.

Application

Previous year participation does not guarantee participation in the 2022 campaign. To be considered for participation in the 2022 Great Fish Community Challenge, **A COMPLETE APPLICATION, INCLUDING ORGANIZATION FINANCIAL INFORMATION ATTACHED IN THE REQUESTED FORMAT, MUST BE SUBMITTED TO WHITEFISHCOMMUNITYFOUNDATION.ORG BEFORE 4:00 P.M. MDT ON June 2, 2022.**

Participation Requirements

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

- Assign a designated grant contact person who checks email daily and reads all Community Foundation newsletters between June 1 and October 21, 2022.
- Attend the mandatory kick-off meeting on June 28, 2022 at 8:30 a.m. at the O'Shaughnessy Center in Whitefish. It is highly recommended that 3 individuals from each participating organization attend this meeting, including the individual who is responsible for marketing your organization's participation in the Great Fish Community Challenge.
- 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 Launch Party at Park Side Credit Union, Whitefish on August 4, 2022 at 5:30 p.m.
- Host an engaging and interactive booth at the Great Fish Fun Run & Community Celebration in Depot Park on September 10, 2022.
- Provide two volunteers to assist with the Great Fish Fun Run & Community Celebration.
- Attend the October 17, 2022 Awards Ceremony at Whitefish Lake Restaurant.

Please note: If an organization fails to attend the mandatory kick-off meeting or meet **any of the participation requirements, the organization will be ineligible to win Special Awards or receive Incentive Grants. Failure to host a booth at the Community Celebration will render an organization ineligible to participate in future Great**

Fish Community Challenges. Whitefish Community Foundation reserves the right to NOT AWARD the Great Fish Matching Grant to any organization for failure to comply with participation requirements.

Challenge Grants Structure

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

The \$10,000 Minimum: Nonprofits must raise at least \$10,000 to qualify for the match. No match will be awarded if the nonprofit does not raise the \$10,000 minimum.

The \$20,000 Cap: Participating nonprofits receive all contributions designated to the organization. The matching grant will be calculated on the first \$20,000 of eligible contributions (defined below) made 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 and non-political 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 other participating nonprofits. The rules enable the Community Foundation to process over 9,000 contributions for 60+ 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 and 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 be used only 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.
- Ineligible contributions are not allowed. (See page 6).
- Only official donation forms are allowed. An official electronic version of the donation form may be found on our website on August 4, 2022. 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 Whitefish Community Foundation's variance power. *(See page 5.)
- Organizations **must not** provide a tax receipt (gift substantiation) for contributions made through the Great Fish Community Challenge. Because donations are made to 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 Fun Run entry or donation forms to Flathead County addresses. Whitefish Community Foundation will mail a donation form to every individual and business that has donated during a previous Great Fish Community Challenge. Official Fun Run entry and donor forms will be available at local banks, businesses, participating nonprofits, 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 all contributions designated to them, and may receive a Great Fish Matching Grant, provided they have met the participation requirements.
- Organizations must not provide any goods or services in exchange for a donor's contribution through the Great Fish Community Challenge.
- Organizations are encouraged to acknowledge all contributions with personal thank you notes as appropriate.
- Organizations collaborating on projects/programs with other nonprofits will be required to submit proof of collaboration.
- 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 of the Foundation 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 to the Great Fish Community Challenge will be accepted
August 4, 2022 through September 16, 2022 at 5:00 p.m. MDT.**

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

- Nonprofits will receive 100% of contributions designated to them by check or cash, regardless of the amount. Contributions received via credit card will be subject to the exact credit card fee assessed by the credit card processing company. The credit card processing company charges 2.9% plus a per transaction fee of \$0.30 for all cards except American Express, which is 3.5% + \$0.30 per transaction. This fee covers the cost incurred to process the credit card transaction, and does not include any additional fees charged by Whitefish Community Foundation. 100% of all designated eligible contributions received by check, cash, and credit card (less the processing fee) up to the first \$20,000 raised by each organization will be eligible for the match. The credit card processing fee is subtracted from each credit card donation as it is processed and subtracted from the fund balance.
- Credit card transactions must be a minimum of \$10.

Eligible contributions include the following:

- Checks made out to Whitefish Community Foundation accompanied by an official donor form.
- Cash contributions will be accepted if they are given directly to Community Foundation staff 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 contributions outside of the Great Fish Community Challenge.
- Online credit card contributions can be made at www.whitefishcommunityfoundation.org
- Noncash contributions (e.g., contributions of stock or other assets) may be eligible. Contact Whitefish Community Foundation directly.
- For donations by payroll deduction, contact Whitefish Community Foundation directly.
- Corporate matching contributions that are otherwise eligible contributions.
- To qualify for matching funds, the Community Foundation must receive the donation on or after August 4, 2022 and on or before September 16, 2022 at 5:00 p.m. MDT.

Ineligible contributions include the following:

- Contributions in exchange for goods and services, including, but not limited to the following:

- 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
 - Contributions accepted in exchange for raffle entry. For example, “Donate and you will be entered to win \$100 worth of merchandise.”
 - Contributions made to fulfill volunteer service hours required by the organization
- Cash contributions that are not made directly by the donor to a Whitefish Community Foundation staff member and accompanied by an official donor form that was completed by the donor
 - Pledges, including those from walk-a-thons, bike-a-thons, swim-a-thons, etc.
 - Contributions to Whitefish Community Foundation to fulfill a pledge agreement with the designated organization

Contribution Reporting

Whitefish Community Foundation will provide contribution information to participating organizations through a web-based portal. Upon acceptance to the Great Fish Community Challenge, two Fund Advisors, appointed in writing by the participating 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 Whitefish Community Foundation on behalf of the organization.

- Organizations are given free, unlimited, online access to review contribution activity.
- Whitefish Community Foundation will provide password information and assistance only 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 16, 2022 at 5:00 P.M. MDT to be eligible to be matched. Donations received after September 16, 2022 at 5:00 P.M. MDT and before October 1, 2022 at 5:00 P.M. MDT 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, 2022.
- Contributions received after October 1, 2022 are labor intensive to process. **The Foundation will retain 10% of contributions made after October 1, 2022 at 5:00 P.M to offset administrative costs and staff time required to process the gift.** Donations received after October 1, 2022 at 5:00 P.M. MDT (less 10%) will be mailed to the designated nonprofit after all contributions are reconciled.

Great Fish Fun Run and Community Celebration

- Each participating nonprofit must have a 10’ x 10’ booth at the Fun Run & Community Celebration in Depot Park on September 10, 2022.
- Whitefish Community Foundation will determine booth location.
- Booth drop off and set up takes place from 7:00 a.m. until 9:00 a.m. on September 10, 2022.
- 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 and removing everything you bring. Be sure to recruit enough help for set-up and clean-up.
- No power is available in the booth area.
- The booths are intended to be an educational opportunity for the community, however, nonprofits may distribute items branded with the logo of their organization. (e.g., 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 contribution.
- 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.
- No dogs or other animals are allowed in Depot Park or on the race course.
- Following the Community Celebration, please clear your area and leave the park as you found it.

Grant Report

The grant report for the 2022 Great Fish Community Challenge is due October 12, 2023, and must be submitted online. Organizations that fail to submit a grant report by the due date will not be eligible to participate in the next Great Fish Community Challenge. Matching funds must be spent within 18 months of issuance or returned to Whitefish Community Foundation, unless the organization has received written approval from the Community Foundation to hold the funds for a specific project. The grant report is used to ensure organizations spend their grant in accordance with their use of funds statement. The grant report is also used to show the 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, Whitefish Community Foundation provides participating organizations with the Great Fish Community Challenge logo. The Foundation will email the logo to the organization upon request, or it can be downloaded at www.whitefishcommunityfoundation.org/faq.

The Great Fish Community Challenge logo may not be altered or embellished 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:

- 2022 Great Fish Community Challenge
- Great Fish Community Challenge
- Great Fish Match Fund
- Great Fish Launch Party
- Great Fish Fun Run & Community Celebration
- Great Fish Awards Ceremony

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

- Great Fish
- 2022 GFCC
- GFCC
- 2022 GFCC and Fish 5K Fun Run
- GFCC and Fish 5K Fun Run

Whitefish Community Foundation Is the Sponsor

If your nonprofit is accepted to participate in the Great Fish Community Challenge, please refer to 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 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 Community Challenge

Participating nonprofits shall not use the name(s) or the logo in any manner that states or implies that 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 August 4, 2022 through September 16, 2022.
- The Great Fish Fun Run & Community Celebration will be held at 9:00 a.m. on September 10, 2022 at Depot Park.
- The Awards Ceremony will be held on October 17, 2022.
- Organizations receive contributions designated to them. They also receive a Great Fish Matching Grant, based on the first \$20,000 of eligible contributions that they raise.
- The match percentage awarded will depend on the ratio between the total amount raised in the Great Fish Match Fund and the total amount of eligible designated contributions raised by participating nonprofit organizations.
- Whitefish Community Foundation will launch the Great Fish Match Fund with \$300,000, inspiring our community to give and making the Great Fish Community Challenge possible.
- Contributions on behalf of participating nonprofits must be made directly to Whitefish Community Foundation.
- Donors are encouraged to give to more than one organization with a single contribution 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 Great Fish Fun Run & Community Celebration. 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 \$7,500 grant.

Whitefish Community Foundation Staff

- Linda Engh-Grady, President & CEO, linda@whitefishcommunityfoundation.org
- Daria Perez, Chief Financial Officer, daria@whitefishcommunityfoundation.org
- Lynnette Donaldson, Director, Programs and Outreach, lynnette@whitefishcommunityfoundation.org
- Jill Seigmund, Grants and Program Outreach Associate, jill@whitefishcommunityfoundation.org
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Additional Questions? Visit www.whitefishcommunityfoundation.org

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



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