Linda Engh-Grady
President & CEO
linda@whitefishcommunityfoundation.org
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 Programs Associate
jill@whitefishcommunityfoundation.org

Liz Scholten, Finance Associate
liz@whitefishcommunityfoundation.org
CONGRATULATIONS!

- MISSION **AWARENESS** CAMPAIGN TO HELP YOU RAISE MONEY

- 78 APPLICATIONS CONSIDERED
- 71 INVITED TO PARTICIPATE
- 10 FIRST-TIME PARTICIPANTS
Great Fish Community Challenge

**SIMPLIFY - MULTIPLY**

- Concept is a community-wide campaign that inspires people to give
- Nonprofits work to raise as much as possible between August 4\textsuperscript{th} and September 16\textsuperscript{th}
- Encourage donors to give during the campaign and help you receive a percentage matching grant from the Community Foundation
- Donors can make one donation and give to multiple charities
The Great Fish Community Challenge is brought to you by:

WHITEFISH COMMUNITY FOUNDATION
Giving Together for the Flathead Valley
Campaign Administrative Cost

$355,000

$5,000/nonprofit x 71 nonprofits = $355,000

Total sponsorship support: $24,000
Expense Breakdown
What do we do?

- Website/Software
  - Online e-commerce portal
- Marketing/Advertising/Printing Mailing Brochure
- Events
  - Launch, Fun Run, Awards Event
- Staff Time
  - Gift Processing, Mailing
- Raise funds to support:
  - Incentive Grants
  - Special Awards
  - The Great Fish Match Fund
Application Early Bird Award
$250 Grant

Flathead Area Mountain Bikers
DARIA PEREZ
Chief Financial Officer
daria@whitefishcommunityfoundation.org
How the Match Works:

- It is not a $1 to $1 or a 50% Match. Do not promote it incorrectly.
- It is a **PERCENTAGE** and we will match on the first $20,000 raised by each nonprofit.
- $10,000 floor on the Challenge.
- The Match Fund starts at $300,000.
- Match will be calculated at the end of the campaign and announced at the awards event October 17\textsuperscript{th}!
Example match calculation

**MATCH FORMULA:**

\[
\frac{\text{Total Match Pool}}{\text{Total eligible amount raised}} = \text{Match %}
\]

<table>
<thead>
<tr>
<th>NONPROFIT</th>
<th>AMT RAISED</th>
<th>AMT ELIGIBLE FOR MATCH</th>
<th>MATCH %AGE</th>
<th>TOTAL MATCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORG 1</td>
<td>$25,000</td>
<td>$20,000</td>
<td>40%</td>
<td>$8,000</td>
</tr>
<tr>
<td>ORG 2</td>
<td>$9,000</td>
<td>$0</td>
<td>40%</td>
<td>$0</td>
</tr>
<tr>
<td>ORG 3</td>
<td>$50,000</td>
<td>$20,000</td>
<td>40%</td>
<td>$8,000</td>
</tr>
<tr>
<td>ORG 4</td>
<td>$15,000</td>
<td>$15,000</td>
<td>40%</td>
<td>$6,000</td>
</tr>
<tr>
<td>TOTALS</td>
<td>$100,000</td>
<td>$55,000</td>
<td></td>
<td>$22,000</td>
</tr>
</tbody>
</table>

Total eligible for match: $55,000
Total Match Pool: $22,000

Match = $22,000 / $55,000 = 31%

**UNKNOWN VARIABLES UNTIL CAMPAIGN IS OVER**
# History of the match

<table>
<thead>
<tr>
<th>YEAR</th>
<th># OF ORGS</th>
<th>TOTAL RAISED</th>
<th>AMOUNT MATCHED</th>
<th>MATCH ELIGIBLE</th>
<th>TOTAL MATCH POOL</th>
<th>MATCH %AGE</th>
<th>MAX MATCH AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>32</td>
<td>$903,939</td>
<td>$15,000</td>
<td>$392,902</td>
<td>$207,701</td>
<td>53%</td>
<td>$7,982</td>
</tr>
<tr>
<td>2016</td>
<td>40</td>
<td>$1,150,524</td>
<td>$15,000</td>
<td>$586,405</td>
<td>$322,523</td>
<td>55%</td>
<td>$8,250</td>
</tr>
<tr>
<td>2017</td>
<td>45</td>
<td>$1,602,742</td>
<td>$20,000</td>
<td>$848,875</td>
<td>$407,460</td>
<td>48%</td>
<td>$9,600</td>
</tr>
<tr>
<td>2018</td>
<td>50</td>
<td>$1,905,479</td>
<td>$20,000</td>
<td>$920,617</td>
<td>$468,931</td>
<td>51%</td>
<td>$10,200</td>
</tr>
<tr>
<td>2019</td>
<td>55</td>
<td>$2,271,611</td>
<td>$20,000</td>
<td>$990,081</td>
<td>$485,140</td>
<td>49%</td>
<td>$9,800</td>
</tr>
<tr>
<td>2020</td>
<td>56</td>
<td>$2,643,108</td>
<td>$20,000</td>
<td>$1,073,566</td>
<td>$601,254</td>
<td>56%</td>
<td>$11,200</td>
</tr>
<tr>
<td>2021</td>
<td>61</td>
<td>$3,519,754</td>
<td>$20,000</td>
<td>$1,188,819</td>
<td>$665,739</td>
<td>56%</td>
<td>$11,200</td>
</tr>
</tbody>
</table>
Ways TO GIVE:

- CHECKS
- CREDIT CARD (nonprofit pays the fees)
- STOCK
- IRA ROLLOVER
- THROUGH A FOUNDATION
- THROUGH A DONOR ADVISED FUND
- CASH....
Ineligible Gifts:

- Tuition payments
- Pledges of any kind – bikeathon, hikeathon, walkathon, etc.
- Tickets sales - wine dinners, other events
- Silent auction proceeds
- Grant money
- Bake sale proceeds
- Gifts given in exchange for benefit
- Gifts given in lieu of volunteer hours
- Checks made payable to anything other than WCF
- Donations made outside of Challenge period
- Holding charity events to raise money for the Great Fish Challenge is prohibited – any ticketed event, gala, auction, etc.
DURING THE CAMPAIGN

- Community Foundation processes all gifts and sends the donors a tax receipt.
- You have access to your Fund through an online portal and you can check it daily for information about who has donated to you. It will have addresses and names of your donors so that you can personally thank them.
- A Leader Board is maintained and updated daily to show how much each organization has raised and how many donations they have received – this is a manual upload...
FUND PORTAL

- Different site than grant application
- Links to set up access will be sent out to advisors two weeks prior to start of campaign
- If not new advisors, use existing login
- Fund Advisor Portal Trainings:
  - Wednesday, July 27 @ 10:00 a.m.
  - Monday, August 1 at 11:00 a.m.
- Watch for email to sign up
Fund Advisor Responsibilities

- Login and check fund regularly
  - Most successful organizations start early and check often

- Review gift information
  - Call us if you notice discrepancies

- Ensure donors are thanked
  - Personal thank-you note
  - Golden opportunity to tell them how you spent their gift!

- Record donation information
  - Excel spreadsheets provided after campaign
  - Know your supporters, build your donor base
New Procedures - Late Gifts

- No longer charging the 10% administrative fee on gifts received after October 1, 2022
  - Held & distributed in one grant in December 2022
- Gifts arriving after January 1, 2023 will be placed in your Great Fish Fund and distributed in July prior to 2023 campaign launch.
- If you do not participate in 2023 or do not apply to participate, any gifts left in your Great Fish Fund will be distributed in July prior to 2023 campaign launch.
Jill Seigmund
Grants and Programs Associate
jill@whitefishcommunityfoundation.org
Community Foundation
Marketing

- Brochures with official donation forms mailed to every donor who gave last year
- Use of Funds booklets distributed throughout Valley
- Advertising campaign
  Newspaper, Radio, Social media, Posters, Banners, Table tents, Coffee sleeves
- Press releases to local media
- KGEZ on Air
- Pop-up donation stations
- Weekly E-newsletters to donors
- Leaderboard
Participant Marketing

- Follow the rules
  - [whitefishcommunityfoundation.org/faq](whitefishcommunityfoundation.org/faq)

- Prioritize low-to-zero cost marketing strategies that will not exhaust your donors
  - Post Great Fish Logo on your website
  - Add Great Fish Logo to print newsletters
  - Send e-newsletters to your donors with link to online donation portal and link to printable donation form
  - Promote the incentive grants to your donors
  - Modify your email signature: “Remember XXX Organization in the Great Fish Community Challenge!”
  - Hang posters in your public spaces
Participant Marketing

Utilize the Great Fish marketing toolkit

- [Whitefishcommunityfoundation.org/faq](Whitefishcommunityfoundation.org/faq)
- Logo for print and digital use
- Postcard
- QR code
- Official donation form
- Fun Run registration form
- Poster
What ELSE can you do?

- Encourage your patrons/volunteers/friends to sign up for the RUN/WALK
  - **Sorry, no pooches allowed**
- Help us get brochures into worthwhile venues
- Help us distribute table tents at area restaurants
- Wave signs at the pop-up donation stations
- Promote the Challenge at your events…but follow rules
  - Borrow the stand up banners
Check First

- Issuing press releases that mention the Challenge or WCF
- Running advertisements that mention the Challenge or WCF
- Printing materials that promote the Challenge
- Planning events or gatherings to promote your participation in the Challenge
Free Mingling Events

- You can have brochures at your events
  - Equal opportunity to donate to all participating organizations
  - Above all, promote the spirit of the Challenge... Give to multiple organizations with just one gift.

- Grass Roots Get-Togethers
  - Weigh pros and cons – time, energy, cost, impact on your donors vs. return on investment
  - Avoid donor fatigue... remember, your donors are likely giving to several other organizations
Marketing FAQ

whitefishcommunityfoundation.org/faq/

- Preferred marketing activities
- Information to share with donors
- Materials and resources available to participating nonprofits
- Allowable uses of the Great Fish Community Challenge name
- Correct way to refer to Whitefish Community Foundation when promoting the Challenge
Lynnette Donaldson
Director, Programs and Outreach
lynnette@whitefishcommunityfoundation.org
Important Dates

- Great Fish Challenge Launch Party August 4 at Park Side Credit Union in Whitefish
- Great Fish on Air with KGEZ August 26
- Great Fish 5K Fun Run and Community Celebration September 10 at Depot Park
- Giving campaign ends September 16 at 5:00 pm
- Great Fish Community Challenge Awards Event October 17 at Whitefish Lake Restaurant
2022 Great Fish Community Challenge

INCENTIVE GRANTS & SPECIAL AWARDS
Incentive Grants

- Launch Party & Fun Run Matching Incentives:
  - Donors who give $100 or more to a single nonprofit are entered to win 1 of 10 $100 matching grants

- Great Fish on KGEZ
  - Donors who give $100 or more to a single nonprofit during the event are entered to win 1 of 8 $250 matching grants

- Biggest Catch of the week - $1,000 per week
Biggest Catch

- $1,000 awarded weekly to the organization with the most unique donors
  - Calculated from Friday to Thursday of each week
  - Photo-op with the sponsor on Friday or Monday
  - You can win this award once
  - All winners eligible to win Biggest Catch Overall

A UNIQUE DONOR = A HOUSEHOLD

- *PLEASE*, do not solicit donations from multiple members of the same household in an attempt to win the weekly Biggest Catch Award
  - In 2021 we processed over 9,000 gifts for 61 nonprofits
Thursday Pop-Up Donation Stations

- Aug 11: Bigfork Art & Cultural Center 11:30 a.m. to 3:00 p.m.
- Aug 18: – First Interstate Bank Whitefish 11:30am - 3:00 pm
- Aug 25: Columbia Falls Community Market 5:00 to 8:00 p.m.
- Aug 26 – First Interstate Main St. Kalispell 9:00 am – 1:00pm
  - In conjunction with Great Fish On-Air with KGEZ
- Sep 1: Glacier Bank Lakeside 11:30am – 3:00pm
- Sep 8: Bonsai Brewing Whitefish 5:00 to 8:00 p.m.
  - Fun Run race packet pick-up event
- Sep 13: Glacier Bank Whitefish 11:30am - 3:00pm
Special Awards
Presented at Fun Run

- Finest Fishing Award $500
- Fish Teamwork Award $500
- New Fish on the Block Award $500
- Upstream Award $500
- Most Improved Fishing Award $500

Best Booth Awards:
- 1st Place $1,000, 2nd Place $500, People’s Choice $500

Top Competitive Division (Male & Female Finishers):
- 1st Place $300, 2nd Place $200, 3rd Place $100
Great Fish Award
$7,500 Great
Special Awards
Presented October 17

- Great Fish Award $7,500:
  - Recognizing outstanding nonprofit leadership & growth
  - Exceptional leveraging of Challenge platform
- Corporate Citizenship Award $2,500:
  - Local business fostering employee giving
- Connie Heckathorn Cheers for Volunteers $2,500:
  - Recognizing outstanding volunteer service
- Biggest Catch Overall $2,000:
  - Overall Biggest Catch Winner
2022 Great Fish Community Challenge

CAMPAIGN EVENTS
Launch Party August 4th

- Park Side Credit Union Whitefish 5:30 – 7:00 p.m.
- Check-in and packet pickup
- Free community event
- Food and Drink – Beverages and snacks provided
- Matching Incentives:
  - Donors who give $100 or more to a single nonprofit are entered to win 1 of 10 $100 matching grants
Great Fish Awards Ceremony

- Monday, October 17th at 4:30 p.m.
- Whitefish Lake Restaurant (Golf Course)
- Please plan to attend
  - Absent organizations will forfeit their Great Fish Matching Grant
- Cheer on your fellow nonprofits:
  - Great Fish Match revealed
  - Grant check presentation
  - Special Awards presented
Great Fish 5K FUN RUN & Community Celebration
September 10th
Zero Waste Event

- Partnering with Dirt Rich
- Compostable serving dishes, utensils, napkins and race cups
- Bring your own water bottle
- Discouraging non-environmentally friendly decorations
  - No balloons!
- Pack it in, pack it out
Great Fish FUN Run & Community Celebration

Event schedule:

- Nonprofit Fair
- Lunch
- Tot Trot
- Cheer Contest
- FUN Run 5K and 1 Mile
Nonprofit Fair 9am -1pm

- 10 x 10 tent – no stakes in the park
- Sand/water buckets & bungees
- This campaign is all about AWARENESS
- Over 600 people in attendance
- Interactive
- Target your booth to the people you are trying to reach
  - 1st Place $1,000, 2nd Place $500, People’s Choice $500
Great Fish Community Challenge
Helping our Community to RUN!

September 10, 2022
Great Fish Fun Run & Community Celebration

- Nonprofit Fair 9:00 a.m. to 1:00 p.m
- Competitive Run: 10:00 a.m.
- Fun Run 10:30 a.m.
- Lunch 11:30 a.m
- Tot Trot 11:45 a.m.
- Presentation of Awards 12:00 p.m.
  - Run Top Competitive Divisions
  - Best Booth Awards
  - Special Nonprofit Awards
Fun Run & Community Celebration Committee Chairs

- Course Volunteer Coordinators: Kailyn Rowe & Riley Polumbus, Logan Health Foundation – Whitefish
- Course Directions: Darrah Rogers, FVCC Foundation
- Water Stations: Julie Tickle, DREAM Adaptive Recreation
- Entertainment Committee: Deidre Corson, North Valley Music School and Brett Holmquist, Ravenwood Outdoor Learning Center
- Emcee: Bill Angel, Lighthouse Christian Home
- Nonprofit Booths: Gretchen Boyer, Land to Hand
- Kids Activities: Hilary Shaw, Abbie Shelter
- Race Setup/Cleanup Chair: Kacy Howard, Nate Chute Foundation
Committees in Need

- Chief of Course
  - Oversee race course

- Lunch Committee Chair: 15 volunteers
  - Set-up, serving, clean up

- Run Race Results Chair: 2 volunteers
  - Timing experience an asset

- Decorations Chair: 10-12 volunteers
  - Depot Park and on course

- Run Registration: 6 volunteers
  - Techy person to help coordinate run registration

- Interested in signing up as Committee Chair?
  - Call or email us please (406) 863-1781
  - Volunteers will use Sign-up Genius to register
Tips for Campaign Success

HELP US HELP YOU:

- Submit forms on time & have a system in place to avoid forgetting
  - 2021 Great Fish Grant Report due Oct 27, 2022 4pm
  - 2022 Great Fish Grant Report due Oct 12, 2023 4pm
- Read the weekly Great Fish Nonprofit Newsletter
- Organize early for September 10th
- Be enthusiastic and be prepared for events
  - Don’t wait until September to engage
  - Take advantage of opportunities presented