



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

2023 Great Fish Community Challenge

Rules and Procedures for Participating Nonprofit Organizations

Great Fish Community Challenge Giving Period

August 10 – September 15, 2023

Great Fish Fun Run & Community Celebration
September 9, 2023 - 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 \$22 million for over 85 local nonprofits since 2015.

The 2023 campaign will launch August 10 and span five weeks. With a single gift made to Whitefish Community Foundation between August 10 and September 15, 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 during 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 covers the significant expenses associated with the Great Fish Community Challenge, including staff support, marketing, administration, and event management (\$309,558 in 2022) 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 nonprofit organizations in the areas of health and human services, education, conservation, recreation, arts and culture, and animal welfare. 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 2023 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 fiscally sponsored organization operates under the EIN of another 501(c)(3) nonprofit organization.)
- Have updated their Candid (formerly GuideStar) Seal of Transparency to achieve a Bronze Seal at minimum **prior** to submitting their application.
- Have submitted all required documentation for previous Whitefish Community Foundation grant awards.
- Confirm that funds raised will not be used for programs promoting a religious doctrine or political agenda.
- Agree to comply with 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.

- Organizations that did not participate in the 2022 Great Fish Community Challenge must have attended either the January 26, 2023 or the January 31, 2023 informational meeting to be eligible to apply to participate in the 2023 Challenge.
- Returning organizations must upload either their 2021 or 2022 signed and filed Form 990 or 990-EZ into the 2023 Great Fish Community Challenge application. Correspondingly, participants in the 2023 Great Fish Community Challenge (or participants in an earlier year) that intend to apply to participate in 2024 must file either Form 990 or Form 990-EZ for the 2022 or 2023 tax year and upload it into the 2024 Great Fish Community Challenge application. **Returning organizations that file only a 990-N (e-Postcard) are not eligible to apply. Organizations applying to participate in the campaign for the first time will not be required to upload Form 990 or Form 990-EZ if they are 990-N (e-postcard) filers. These organizations will upload verification that they have filed Form 990-N for the 2021 or 2022 tax year.**
- In addition to meeting the above 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 2023 campaign. To be considered for participation in the 2023 Great Fish Community Challenge, **A COMPLETE APPLICATION MUST BE SUBMITTED TO WHITEFISH COMMUNITY FOUNDATION BY 5:00 P.M. MDT ON June 1, 2023.**

Participation Requirements

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

- Ensure the individual who submitted the application checks email daily and reads all Whitefish Community Foundation newsletters between June 1 and October 30, 2023.
- Attend the mandatory kick-off meeting on July 11, 2023 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 the organization's participation in the Great Fish Community Challenge.
- Promote the Great Fish Community Challenge to internal and external constituents.
- Organize board members, employees, and volunteers to fundraise and promote the Great Fish Community Challenge.
- Attend the Great Fish Launch Party at First Interstate Bank, Whitefish on August 10, 2023 at 5:30 p.m.
- Host an engaging and interactive booth at the Great Fish Fun Run & Community Celebration in Depot Park on September 9, 2023 from 9:00 a.m. until 1:00 p.m.
- Provide two volunteers to assist with the Great Fish Fun Run & Community Celebration (in addition to those managing the participating organization's nonprofit booth).
- Attend the October Awards Ceremony (time and location to be decided).

Please note: If an organization fails to attend the mandatory kick-off meeting, host a booth at the Community Celebration, or meet **any of the participation requirements, the organization may not be eligible to receive Special Awards or Incentive Grants, and may not be eligible to participate in the Great Fish Community Challenge.**

Whitefish Community Foundation reserves the right to NOT AWARD the Great Fish Matching Grant 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.

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 10,000 contributions for 70+ 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 Community 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 the Whitefish Community Foundation website on August 10, 2023. The **official donation form may not be altered or 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 individuals and businesses that have donated during recent Great Fish Community Challenges at the Community Foundation's discretion. 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 10, 2023 through September 15, 2023 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 up to 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 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 donation 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.
- Payroll deduction, please 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 10, 2023 and on or before September 15, 2023 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 to designated Fund Advisors only.
- Information can be accessed 24 hours a day from any computer with internet access.
- Donations must be received by September 15, 2023 at 5:00 P.M. MDT to be eligible to be matched. Donations received after 5:00 p.m. MDT on September 15, 2023 and before October 1, 2023 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, 2023.
- Contributions received after October 1, 2023 will remain in the participating organization’s designated Great Fish Fund until December 2023. In December 2023, these late gifts will be released to the designated organization in one grant.
- If contributions originating from the 2023 Great Fish Community Challenge are received after the December 2023 reconciliation is complete, they will remain in the designated organization’s Great Fish Fund until June 2024. In June 2024, these gifts will be released to the designated organization in one grant prior to the start of the 2024 Great Fish Community Challenge.
- Administrative fees will not be charged to process the December 2023 or June 2024 grants.

Great Fish Fun Run & Community Celebration

- Each participating nonprofit must have a 10’ x 10’ booth at the Great Fish Fun Run & Community Celebration in Depot Park on September 9, 2023.
- 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 9, 2023.
- 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.

- Bring everything needed for display, including tents, tables, chairs, table covers, signs, easels, etc.
- This is a zero-waste event. The Community Foundation will provide compostable plates and utensils for lunch. All waste must be recyclable or compostable. Garbage bins will not be provided.
- Nonprofits can give away food at their booths, provided packaging is recyclable or 100% compostable. Contact the Flathead County Public Health Department for information on serving food to the public.
- Nonprofits are responsible for unloading and removing everything they bring. Each nonprofit must 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 give away items branded with the logo of their organization. (e.g., hats, t-shirts, reusable cups).
- If donors wish to give to an organization at the Community Celebration, they must visit the Donations and Information tent. Participating organizations cannot accept donations at their nonprofit booth.
- No dogs or other animals are allowed in Depot Park or on the race course.

Grant Report

The grant report for the 2023 Great Fish Community Challenge is due October 17, 2024 at 5:00 p.m. MST, and must be submitted online. Organizations that fail to submit a grant report by the due date may 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, 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:

- 2023 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
- 2023 GFCC

- GFCC
- 2023 GFCC and Fish 5K Fun Run
- GFCC and Fish 5K Fun Run

Whitefish Community Foundation Is the Sponsor

Whitefish Community Foundation is the sponsor of the Challenge. The Great Fish Community Challenge is not a nonprofit entity and is not the sponsor. When referring to Whitefish Community Foundation and the Great Fish Community Challenge, participating nonprofits are required to follow these guidelines.

It is permissible to state

- The Great Fish Community Challenge is brought to you by Whitefish Community Foundation
- The Great Fish Community Challenge is sponsored 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 Whitefish Community Foundation

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 10, 2023 through September 15, 2023.
- The Great Fish Fun Run & Community Celebration will be held at 9:00 a.m. on September 9, 2023 at Depot Park.
- 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 Whitefish 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

- Alan Davis, President/CEO, alan@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
- Liz Scholten, Associate Director of Finance, liz@whitefishcommunityfoundation.org

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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