Whitefish Community Foundation Staff:

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CONGRATULATIONS!

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

- 78 INVITED TO PARTICIPATE
- 6 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 10th and September 15th.
- 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:
Campaign Administrative Cost

$350,000

$5,000/nonprofit x 78 nonprofits = $350,000

Total sponsorship support: $40,000
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
$500 Grant

Gateway to
Glacier Trails
2023 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 Air with KGEZ
  - Donors who give $100 or more to a single nonprofit during the event are entered to win 1 of 10, $250 matching grants
Biggest Catch Incentive Grants

1) Launch Day Biggest Catch for most unduplicated donors $1,000

2) **Weekly Biggest Catch for most unduplicated donors $1,000/week**

3) **Weekly Biggest Catch for most $$ raised $1,000/week**

- **Calculated from Friday to Thursday at midnight each week during the campaign**
- Each participating organization is eligible to win one of these $1,000 incentive grants during the Challenge
Biggest Catch Grants

- Be prepared for photo-op with sponsor on Friday or Monday

- Winners of weekly Biggest Catch Incentive Grants for most unduplicated donors are eligible to win the Overall Biggest Catch for most donors during the 2023 Challenge - $2,000

- **A UNIQUE DONOR = A HOUSEHOLD**
  
  *PLEASE*, do not solicit donations from multiple members of the same household in an attempt to win the Biggest Catch Incentive Grants
  
  - In 2022 we processed over 10,000 gifts for 70 nonprofits
Special Awards
Presented October 24

- Great Fish Award $7,500:
- 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
- Most Improved $2,000:
  - Significant donor outreach and growth over time
Staff Awards - $1,000 Grants

- Finest Fishing
  - Outstanding marketing
- Fish Teamwork
  - Helps WCF run a successful Challenge
- New Fish on the Block
  - Standout first-time participant
- Upstream Award
  - Extraordinary leadership taking organization to new level
Great Fish Award
$7,500 Great
The Great Fish Award is given to an organization that embodies the spirit of the Challenge:

- Leadership and dedication to advance mission
- Enthusiastic participant
- Understands power of platform to tell their story
- Steady growth of donor base
- Commitment to supporting fellow nonprofits

2022 Great Fish Award:
Flathead Warming Center
Grow Your Gifts

- Existing donors are your BIGGEST resource
- Dive into your donor database
- Consider your fundraising goals
- Consider timing
- MAKE THE ASK!

Now what?
- Check fund portal daily – set recognition goal
- Ongoing outreach
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 24th!
### Example match calculation

**Match Formula:**

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

<table>
<thead>
<tr>
<th>NONPROFIT</th>
<th>AMT RAISED</th>
<th>AMT ELIGIBLE FOR MATCH</th>
<th>MATCH %AGE</th>
<th>TOTAL MATCH</th>
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</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>
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<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>
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<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 = 40%

**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>
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<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>
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<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>
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<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>
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<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>
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<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>
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<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>
<tr>
<td>2022</td>
<td>70</td>
<td>$4,254,258</td>
<td>$20,000</td>
<td>$1,370,178</td>
<td>$808,405</td>
<td>59%</td>
<td>$11,800</td>
</tr>
</tbody>
</table>
Ways TO GIVE:

- CHECKS
- ACH/e-CHECKS
- CREDIT CARD
- 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 Community Challenge is prohibited – any ticketed event, gala, auction, etc.
DURING THE CAMPAIGN

- Community Foundation processes all gifts and sends the donors a tax receipt.
- Fund Advisors – 24/7 access to fund via online portal
  - Complete donor & gift information
  - Mailing addresses and email addresses in some cases
- 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...
WCF Software Systems

- Donor or donation information: Fund Advisor Login
- Grant administration – applications, grant agreements, grant reports: Grant management software (Grantee Login)
FUND PORTAL

- 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:
  - To be decided – watch newsletter!
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
  - Download and permanently record gift info from portal
  - Know your supporters, build your donor base
Late Gift Procedures

- Gifts received after October 1, 2023
  - Held & distributed in one grant in December 2023
- Gifts arriving after January 1, 2024
  - Placed in your Great Fish Fund and distributed in July prior to 2024 campaign launch
- If you do not participate in 2024 or do not apply to participate
  - gifts left in your Great Fish Fund will be distributed in July prior to 2024 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 inserted in the Daily Inter Lake and weekly newspapers
- Advertising campaign
  - Newspaper, Radio, Social media, Posters, Banners, Table tents
  - Press releases to local media
- KGEZ on Air
- Pop-up donation stations
- Weekly E-newsletters to donors
Participant Marketing

- Prioritize low-to-zero cost marketing strategies that will not exhaust your donors
  - Display Great Fish Community Challenge logo on your website and in your 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
  - Logo for print and digital use
  - Postcard
  - QR code
  - Official donation form
  - Poster
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
Official Great Fish Lingo

- Great Fish Community Challenge
- Great Fish Launch Party
- Great Fish On Air with KGEZ
- Great Fish Fun Run & Community Celebration
- Great Fish Awards Ceremony
What ELSE can you do?

- Encourage your patrons/volunteers/friends to sign up for the RUN/WALK
- Help us distribute table tents at area restaurants
- Wave signs at the pop-up donation stations
- Promote the Challenge at your events
  - Borrow the stand up banners
Nonprofit Events during Campaign

- 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
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
What Not To Do

1. Create unnecessary work and expense
   - Is this REALLY going to build awareness? Keep the ultimate goal in sight, which is to raise money and grow your relationship with donors.

2. Kill unnecessary trees
   - No mass mailings from purchased mailing lists, we are already mailing brochures to everyone who has ever given during the campaign.

3. Introduce unnecessary events
   - Assess free-mingling events
     - Were they worth the effort?
     - Did you receive donations at the event?
     - Would attendees have given anyway?
Lynnette Donaldson
Director, Programs and Outreach
lynnette@whitefishcommunityfoundation.org
2023 Great Fish Community Challenge

CAMPAIGN EVENTS & DONATION STATIONS
Important Dates

- **Great Fish Launch Party** August 10 at First Interstate Bank, Whitefish
- **Great Fish on Air with KGEZ** August 25
- **Great Fish Fun Run and Community Celebration** September 9 at Depot Park
- Giving campaign ends September 15 at 5:00 pm
- **Great Fish Awards Ceremony** October 24th at Wachholz College Center
Launch Party August 10th

- **First Interstate Bank Whitefish** 5:30 – 7:00 p.m.
- DO NOT CHECK-IN
- Assign one person for packet pickup
- Free community event
- 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 On-Air with KGEZ

- Opportunity for free outreach and exposure
- Not mandatory
- LIVE radio show – will not run like clockwork
  - Do not send someone on a tight schedule
- Timeslot registration link to SignUp Genius in newsletter - you can’t simply arrive
- If you sign up, please show up
- Know your fundraising goal!! (stated in your application)
- Donors giving $100 or more to a single nonprofit during the show are entered to win 1 of 10 $250 matching grants
Pop-Up Donation Stations

- Not about money, but creating awareness
- We will have 9 this year – on printed calendars & in newsletter
- SignUp Genius link in newsletter

- August 25 – Great Fish On Air with KGEZ
  - Donation Station at First Interstate Bank, Kalispell
- Sep 7: Bonsai Brewing Whitefish 5:00 - 7:30 p.m.
  - Fun Run race packet pick-up event
Great Fish FUN RUN & Community Celebration
September 9th
Zero Waste Event

- 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
- **Hand-out snacks in 100% compostable packaging**
Great Fish Fun Run & Community Celebration

- Nonprofit Fair 9:00 a.m. to 1:00 p.m
- 5K
- 1-Mile
- Lunch
- Tot Trot
- Presentation of Awards
  - Top 5K finishers
  - Best Booth Awards
Nonprofit Fair 9am - 1pm

- 10 x 10 tent – no stakes in the park
  - Sand/water buckets & bungees
- Nonprofits are assigned a spot in the park
- New this year – nonprofits can share a tent
- Over 600 people in attendance
- Interactive booths encouraged
Fun Run Registration

- Online registration only
- No paper registration forms this year
- NO REGISTRATION at Depot Park
  - (No day-of event registration option)
- One price - $20 for 1 Mile and 5K
- Online registration opens July 15th
Special Awards
Presented at Fun Run

- Best Booth Awards:
  - 1st Place $1,000
  - 2nd Place $500

- Top Male and Female Finishers:
  (Direct grant to nonprofit of choice):
  - 1st Place $500
  - 2nd Place $250
  - 3rd Place $100
Fun Run & Community Celebration
Volunteer Opportunities

September 9, 2023
Fun Run & Community Celebration Committees

- Course Volunteer Coordinators: Kalen Young & Riley Polumbus, Logan Health Foundation – Whitefish
- Water Stations: Julie Tickle, DREAM Adaptive Recreation
- Emcee: Bill Angel, Lighthouse Christian Home
- Nonprofit Booths: Gretchen Boyer, Land to Hand
- Race Setup/Cleanup Chair: Kacy Howard, Nate Chute Foundation
- Lunch Committee: Brit Clark, Conrad Mansion Museum
- Race Packet Pick-Up: Hilary Lindh, Flathead Valley Ski Education Foundation
Committees in Need

- Run Race Results Chair: 2 volunteers
  - Timing experience an asset
- Course Directions: 4 volunteers

- Interested in signing up as Committee Chair?
  - Call or email us please (406) 863-1781
  - Volunteers will use Sign-up Genius to register
Great Fish Awards Ceremony

- Tuesday, October 24\textsuperscript{th} at 5:00 p.m.
- Wachholz College Center, Kalispell
- Organizations need 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
Signage & Banner Replacement Program

- Great Fish Community Challenge logo new in 2019
- How to apply
  - Log into the grant management software
  - Click “Apply” on top toolbar
  - Enter access code SIGNAGE23 top right
- $500 maximum request
- Replacement signage & banners only
Tips for Campaign Success

HELP US HELP YOU:

- Submit forms on time & have a system in place to avoid forgetting
  - 2022 Great Fish Grant Report due Oct 12, 2023 5pm
  - 2023 Great Fish Grant Report due Oct 17, 2024 5pm
- Read the weekly Great Fish Nonprofit Newsletter
- Organize early for KGEZ & Sept 9th
- Be enthusiastic and be prepared for events
  - Take advantage of opportunities presented
2024 Great Fish Community Challenge
Abridged Application Criteria

- Participant for last 3 consecutive years
- Leadership unchanged for two years
- Fund Advisors are effective
- Leverages campaign to maximum advantage
- Organization engaged in Fun Run & Community Celebration
- Application is thoughtful, accurate and complete
- Application demonstrates sound oversight
- Follow-ups are submitted on time