



Donor-Initiated Public Fundraising For Individual Funds

Executive Committee Adopted May 18, 2005

Coastal Community Foundation (CCF) wishes to support both individual donors and community donor groups (the Donor) that create funds at CCF and desire to build those funds through public fundraising done in accordance with the following guidelines set by CCF's Board.

CCF restricts its fundraising support services to endowed funds that are *unrestricted, field-of-interest, or designated*. It only supports community advised funds with specific Board approval and does not support fundraising for individual advised funds.

CCF only supports direct mail and individual solicitation for gifts that are 100% deductible. This does not include events or raffles or gifts in which the donor receives some benefits. It can not support fund raising events and will not generally pay for fundraising expenses or staffing from funds held by CCF.

CCF's Responsibilities

The Foundation will be responsible for:

- Management of all money accepted from the initial Donor and other contributors.
- Support of direct mail solicitations through provision of remit envelopes.
- Provide gift acknowledgement as required by law and as agreed upon with the Donor. For gifts of less than \$250, the individual's check may serve as evidence of their gift;

therefore CCF may choose not to issue thank you letters. If there is an excessive number of contributions, the Donor and CCF may agree on alternative arrangements for acknowledgments.

- Management of all donor information and donor recognition within CCF's materials.
- And, handle all grantmaking from the fund using the proceeds raised.

Donor Responsibilities

CCF is pleased to be able to provide advice on fundraising plans and their viability, but CCF does not participate in solicitations.

- Before undertaking any donor solicitations, the Donor will review with CCF staff all letters and materials to be used. Use of CCF's name in letters, advertising and promotions must be approved in advance by CCF.
- The Donor will provide CCF with a complete list of all potential donors being solicited to permit coordination with CCF's other efforts.
- The Donor will be responsible for all fund raising expenses and will maintain appropriate financial controls and records for all fundraising efforts.
- If necessary, the Donor will secure liability insurance that is approved by CCF.