



## **Donor-Initiated Fundraising Policy**

Thank you for expressing your confidence in The Spartanburg County Foundation by establishing a fund with us. The Spartanburg County Foundation is committed to improving the lives of Spartanburg County residents by promoting philanthropy, encouraging community engagement, and responding to community needs, and is pleased to work with you in helping to develop your fund.

On occasion, fundholders may choose to hold fundraising events or a solicitation. "Solicitation" refers to any time individuals are asked verbally, in writing, or by electronic means to contribute to a fund. The term "fundraising events" includes, but is not limited to, receptions, dinners, parties, sports or entertainment events, auctions, and other similar activities.

### **OPTIONS**

- 1. Independent Fundraising by 501(c)(3)** Organizations may sponsor a fundraising event/solicitation. The organization is responsible for collecting all monies and forms, paying all event/solicitation expenses, and issuing tax receipt letters to their individual contributors. The net income (net of expenses paid) may then be deposited into the organization's Foundation Fund. In addition, the organization must abide by the fundraising requirements listed on page 2 of this policy. The organization must also state in all marketing materials that the net proceeds will benefit their Foundation fund (see Marketing section on page 2 for additional details). Fundholders that conduct fundraising events through the Foundation (where the Foundation processes individual checks, forms, or receipt letters) will be subject to a fee of \$20 for each transaction processed by the Foundation.
- 2. Independent Fundraising by non-501(c)(3)** Organizations may hold a fundraising event/solicitation. The organization is responsible for collecting all checks and forms, and paying all event/solicitation expenses. The net income (net of expenses paid) may then be forwarded to the Foundation and indicating a particular fund. In this case, the Foundation does not endorse the activity nor is it involved in the planning or execution. The Foundation does not send tax receipts to the individual contributors, and no one receives a charitable deduction for participating in the event. A receipt for the net amount received is sent by the Foundation to the organizing group. In addition, the organization must abide by the fundraising requirements listed on page 2 of this policy. Fundraisers that conduct fundraising events through the Foundation (where the Foundation processes individual checks, forms, or receipt letters) will be subject to a fee of \$20 for each transaction processed by the Foundation.
- 3. Solicitation to a Fund** You may promote contributions to a fund through marketing efforts such as brochures, posters, information sessions, or an appeal letter to prospective contributors. In response to these efforts, donors may make gifts directly to the fund. Checks should be made payable to the name of the Fund/SCF and sent directly to SCF (gifts of appreciated assets made directly to SCF are also acceptable).



The donor will receive a gift acknowledgement letter from SCF indicating that the gift is tax deductible. All contributions are listed, with the donor's name, on your fund statement.

### **MARKETING**

All publicity materials must be reviewed and approved by the Foundation prior to print and public release. All materials should explicitly state that funds are being raised "on behalf of" The Spartanburg County Foundation, not "by" the Foundation. Any advertising or promotional materials created for a fundraising event must make clear that monies are being raised for a fund at the Foundation. All materials, including online and social media promotions, must include the following language: "XYZ Fund is a component fund of The Spartanburg County Foundation." Any use of the Spartanburg County Foundation's logo must be approved in advance by the Foundation. Requests to use the logo should be directed to Kim Atchley, Communications Officer, at [katchley@spcf.org](mailto:katchley@spcf.org) or (864) 582.0138.

### **FUNDRAISING REQUIREMENTS**

- Application – The fundraising group must complete a Fundraising Application (attached). This application must be submitted at least 60 days prior to the scheduled event for Foundation review.
- Approval – If the event is approved, all SCF Fundraising Events Guidelines and Procedures must be followed. Please see the SCF Fundraising Events Guidelines and Procedures document.
- Fee – Fundraisers are responsible for processing all monies and forms, paying all expenses, and issuing receipt letters to their donors. Only net proceeds of the event/solicitation should be delivered to the Foundation. Failure to abide by this requirement will result in a transaction fee of \$20 for each transaction processed by the Foundation. (A transaction is any individual check or form received or any expense invoice paid by the Foundation.)
- Raffles – No raffles are allowed
- Acceptance – If application is not approved and funds are received, the donations will not be accepted by the Foundation.



## Acknowledgement

I have reviewed the Donor-Initiated Fundraising Policy, dated January 1, 2017, established by The Spartanburg County Foundation and agree to adhere to this policy as it relates to the following fund.

Fees:

Fundraisers are responsible for processing all monies and forms, paying all expenses, and issuing receipt letters to their donors. Failure to abide by this requirement will result in a transaction fee of \$20 for each transaction processed by the Foundation. (A transaction is any individual check or form received or any expense paid by the Foundation.)

Fund Name: \_\_\_\_\_ [# \_\_\_\_\_]

\_\_\_\_\_  
Printed Name (authorized signor)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Please return this form to:**

Attn: Heather Ailstock  
The Spartanburg County Foundation  
424 East Kennedy Street  
Spartanburg, SC 29302  
Phone: 864-582-0138  
Email: [hailstock@spcf.org](mailto:hailstock@spcf.org)



## Fundraising Application

Fund Name \_\_\_\_\_ [# \_\_\_\_\_]

Name of Fundraising Event \_\_\_\_\_

Date of Event \_\_\_\_\_

Describe the fundraising event (include a detailed description of activities that will happen at the event, number of participants expected, the groups experience in this type of fundraising and any other information that will help us support your effort.) Please attach additional information if necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fundraising Goal \$ \_\_\_\_\_ (This is the net amount of money that you hope to raise.)

Contact person: \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone (mobile) \_\_\_\_\_ (work) \_\_\_\_\_

Best place and time to be contacted: \_\_\_\_\_

Attach an estimated budget including projected gross revenue from identified sources and projected expenses with name of vendor. Please contact the Foundation office for a budget form, or one may be found in our Fundraising Events Forms document.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (if different than contact person) \_\_\_\_\_

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**Office Use Only**

Date Received \_\_\_\_\_  Approved  Disapproved

\_\_\_\_\_  
President & CEO Signature

*Approved: December 15, 2016*  
*Effective: January 01, 2017*