



DONOR-INITIATED FUNDRAISING GUIDELINES

The Community Foundation of Louisville (Foundation) appreciates your interest in raising money to develop your component fund.

The IRS holds the Foundation legally responsible for all fundraising undertaken for any of its component funds because such funds are not their own legal entities, and the Foundation, as well as the fundholder, can face serious penalties if procedures are not established and carefully followed. Therefore, the Foundation generally does not allow its name or the fund name to be used in connection with a fundraising event held by others, but it does make exceptions in limited cases. In such cases, the project and fundraising event must be approved in writing by the Foundation before any formal fundraising occurs.

The Foundation reserves the right to deny approval of any proposed fundraising event or initiative intended to benefit a component fund if the Foundation, in its sole discretion, determines that the proposed event or initiative is not consistent with the Foundation's mission, vision, or values, or for any other reason the Foundation sees fit.

If you are considering a fundraising event, solicitation, or project of any kind, we request that you discuss your plans with the Foundation in advance. Please contact our Director of Stewardship at 502.585.4649 or stewardship@cflouisville.org.

The following guidelines apply to special fundraising activities and general fundraising for component funds within the Foundation.

Applying for Outside Funding

The Foundation does not permit component funds to use the Foundation's 501(c)(3) status or EIN to submit grant applications or funding requests to outside funders, such as government entities, private, public, or corporate foundations.

Foundation Approval of Fundraising Events

The fundraising group must submit the attached Fundraising Application at least **60 days** prior to the fundraising event. If this application is not received 60 days prior to the event, the fundraising group will need to postpone or cancel the event.

Service Fee

If the request is approved, the Foundation may assess a service fee to defray the cost of additional administrative services provided by Foundation staff. In general, this fee will be between \$250 and \$500, but will be assessed on a case by case basis and depend on the additional work required by the Foundation staff. This fee will be deducted from the event proceeds or the fund balance.

Fundraiser Cannot Provide Goods or Services

If the fundraiser is approved, fundholders will be permitted to host a non-ticketed event or gathering where you ask attendees to consider making a gift to your fund. The Foundation is not able to accept contributions for which the donor receives goods or services. This means you are not allowed to host a fundraiser that requires paid admission or for which a ticket is sold. The Foundation also prohibits the sale of items in exchange for a contribution. This includes auction or raffle items, event or dinner tickets, or any other tangible benefit provided to the donor.

Receipts and Acknowledgements for Contributions

The full amount of any cash received must be turned over to the Foundation. Cash donations may not be used to pay expenses with the remainder turned over to the Foundation. Checks related to the event must be made payable to the “Community Foundation of Louisville” with the fund name in the memo line. Checks and cash must be delivered to the Foundation within a reasonable amount of time after the conclusion of the fundraising event. Contributions may be received via credit card through the Foundation’s online platform. The Foundation will provide the appropriate gift acknowledgement to donors who contribute \$250 or more to a fund, provided cash donations are accompanied with the donor’s name and contact information. The Foundation cannot provide a tax receipt for in-kind donations made to support a fundraising event.

Payment of Expenses

All expenses related to the event must be paid by the fundraising group and cannot be paid from the component fund. Distributions from the component fund may be made only to qualified public charities and cannot be used to pay fundraising expenses.

Promotional Materials and Publicity

All fundraising materials (including online resources such as websites, social media, etc.) should indicate that funds are being raised “for the *FUND NAME*, a component fund of the Community Foundation of Louisville.” All uses of the Foundation’s name in advertising and promotion must be approved in advance. The Foundation should be notified of any expected media coverage.

Signing Vendor Contracts

Fundholders are not authorized to sign any contract or agreement related to fundraising initiatives. All contracts, agreements, invoices, etc. related to the event, such as contracts for event space, catering, audio/visual equipment, and/or other vendors, must be signed by an officer of the Foundation. Fundholders should provide these contracts to the Foundation staff contact at least 10 business days before the contract needs to be returned to the vendor.

Charitable Gaming

Charitable gaming in The Commonwealth of Kentucky is regulated by the Department of Charitable Gaming. Any type of charitable gaming on behalf of funds at the Foundation is strictly prohibited. This includes but is not limited to bingo, charity game tickets, raffles, and any form of gambling.

Liability Insurance

Certain fundraising efforts connected with the Foundation may require proof of insurance for liability purposes. The Foundation will determine if liability insurance is required, and the fundraising group is responsible for paying for the cost of the premium, which cannot be paid from the fund. If the event is approved and alcohol is to be served, the vendor is required to provide proof of their Liquor & General Liability Insurance.



Fundraising Event Application

Please return this application to katebr@cflouisville.org
Kate Biagi-Rickert, Director of Stewardship
502.855.6942

Fund Name: _____ Date of Event: _____

Name of Fundraising Event: _____

Type of Event (reception, golf scramble, etc.): _____

Location of Event: _____

Cost to attend event? Y / N *(If yes, this event will not be approved).*

Venue require a certificate? Y / N Venue require to be named as Additional Insured? Y / N

Approximate # of Attendees Expected: _____ Estimated revenue: _____

Alcohol at event? Y / N Alcohol available for sale? Y / N

____ # of drinks provided complimentary *(Open bar events will not be approved).*

Entertainment at event (band/DJ, inflatables, fireworks, etc.): _____

Additional details about event: _____

Please attach an estimated budget including projected revenue, expenses, and vendor(s).

Fund Contact: _____ Email: _____

Address: _____ Phone: _____

I have received a copy of the Donor-Initiated Fundraising Guidelines. I agree to use all disclosures as instructed by the Foundation and to review all printed and promotional material with the Foundation staff prior to distribution.

I understand that I cannot charge admission or sell items in exchange for donations, I cannot sign vendor contracts, and cannot pay fundraising expenses from my fund.

Signature: _____ Date: _____