



Guidelines for Fund-Related Events

When a fundraising event is organized to benefit a fund of The Dayton Foundation, the IRS and the State of Ohio hold the Foundation responsible for providing appropriate receipts and oversight. For this reason, all events benefiting Foundation funds are subject to the Fundraising Policies and Procedures for Component Funds of The Dayton Foundation and the guidelines covered in this document.

Application Procedure

All events conducted by funds of the Foundation are required to submit the Application to Hold a Fund-Related Event. This application should be submitted to the responsible staff person for your fund at least **two months prior to the date of the event.**

Types of Funds

Fees and services related to events may vary by the type of fund. The Dayton Foundation does not provide event planning services.

Charitable Checking AccountsSM

- No fees
- Not invested
- Acknowledgement letters will be sent for charitable gifts (only charitable donations, no split-gift acknowledgements)
- Insurance runs through The Dayton Foundation
- QR code and shareable link provided
- Use of Foundation's Eventbrite registration site
- Cannot use to pay event expenses
- No invoices

Event Fund - \$250

- Not invested
- Acknowledgment letters are sent for charitable gifts
- Insurance runs through The Dayton Foundation
- QR code and shareable link provided
- Pay up to two program expenses
- Up to two invoices for sponsorships
- Use of Foundation's Eventbrite registration site
- Use of Square[®] point of sale device

Event Fund - \$600

- Not invested
- Acknowledgment letters are sent for charitable gifts
- Insurance runs through The Dayton Foundation
- QR code and shareable link provided
- Unlimited program expenses
- Unlimited invoices
- Use of Foundation's Eventbrite registration sites
- Use of Square point of sale device

Committee-Advised Funds

- Community investment fee according to the Foundation's fee schedule
- Balance is invested, and investment manager fees are deducted on a percentage basis
- Acknowledgement letters are sent for charitable gifts
- Insurance runs through The Dayton Foundation
- QR code and shareable link provided
- Unlimited program expenses
- Unlimited invoices
- Use of Foundation's Eventbrite registration site
- Use of Square point of sale device

Contracts with Event Vendors

Because your fund is a component fund of The Dayton Foundation, any contract with an event venue, caterer or other vendor must be approved by the Foundation. Additionally, all contracts must be written between The Dayton Foundation and the vendor, not in the name of the fund. As a fund advisor, you do not have legal authority to sign a contract on behalf of the Foundation. The responsible staff person for your fund can assist you with the proper approval and signatures from The Dayton Foundation.

Insurance

Funds of The Dayton Foundation and the events relating to those funds usually are covered by the Foundation's liability insurance. However, additional documentation regarding events may be required by the insurance company. Staff will notify you of needed documentation upon approval of your event application. If alcohol will be served at your event, please review the Alcohol Policy below for required documentation.

Alcohol Policy

The Dayton Foundation **will not** apply for a liquor permit for any event. Therefore, the service of alcohol must be approved pursuant to a permit held by the caterer, venue or other organization associated with the event. Only employees of the permit holder may serve alcohol at the event. In no instance shall volunteers or others serve alcohol.

The holder of the liquor license relating to the service of alcohol at your event will be required to submit the following to The Dayton Foundation:

- Copy of the State of Ohio Liquor Permit,
- Certificate of Liability Insurance provided by the holder of the liquor license and by the caterer serving the alcohol, and
- Liquor Liability Indemnification agreement holding the component fund and The Dayton Foundation harmless (indemnification agreement is provided to you by the Foundation).

Third Party Event Sites

The Dayton Foundation does provide registration services through Eventbrite. The Foundation has an exclusive agreement with Eventbrite. Therefore, any event that takes registrations **must** use Eventbrite. Foundation staff will set up your access to Eventbrite. The fund advisor or designated contact is responsible for setting up the fundraiser event page on Eventbrite and will have access to monitor the registrations.

The use of any alternative vendor must be approved by Foundation staff.

Payment of Event Expenses

All expenses associated with the fundraising event must be met by the event organizers, either through contributions from event participants or from underwriting. Events approved by the Foundation must have a realistic expectation of netting 60 percent or more of gross revenues. The Dayton Foundation, at its discretion, may require you to submit an event budget detailing expected income and expenses to show how you will meet this goal.

Event expenses may be paid through the Foundation using the standard program expense procedure associated with Donor- or Committee-Advised Funds, and Event Funds. This procedure consists of completing a program expense form and submitting it with the appropriate approval and documentation. The responsible staff person for your fund can assist you with this process. Charitable Checking Accounts are not eligible to use for paying expenses.

Receipt of Event Income

The Dayton Foundation will provide event organizers with a deposit slip to record contributions. This sheet must be completed each time an event-related deposit is made to the fund.

No cash gifts will be accepted by the Foundation. If cash is collected at an event, the event organizers will need to obtain a cashier's check or money order or write a personal check for the amount to be deposited into the fund.

Contribution checks should be made payable to "The Dayton Foundation" with the name of the designated fund and specific fund number included on the memo line.

Credit Card Gifts

Contributions may be received by credit card via the payment portal on The Dayton Foundation's website. The Foundation can provide a unique link to your fund for your event website, if requested. Donors may at any time use personal devices to access the payment portal online and enter their payment information.

It is Foundation policy that staff and volunteers may **not** enter credit card gifts for donors. We also strongly recommend that your fund's committee members and volunteers follow this policy for their own protection.

Based on availability, The Dayton Foundation can provide a Square point of sale device for donations at the event. You must notify Foundation staff two weeks prior to your event to request use of the Square reader/software.

If you choose to use a vendor to manage gifts and registrations, please refer to the section titled Third Party Event Sites.

Pledges

Please inform your contact person at The Dayton Foundation if pledges are part of a fundraising campaign. A "pledge" consists of any commitment in writing that promises a future payment. Copies of all pledge forms must be submitted to The Dayton Foundation to facilitate tax reporting.

Acknowledgment of Contributors

The Dayton Foundation will acknowledge qualifying contributions to your fundraising event. The acknowledgement letter will contain the amount of the contribution, the date on which the contribution was made and a description of the goods and services provided in exchange for the contribution, if applicable. If donors are receiving split-gift acknowledgments for contributions where some benefit was received, the letter will explain that the charitable deduction is limited to the excess of the contribution over the fair market value of such goods and services.

Advertisement and Promotional Materials

All publicity materials must be reviewed and approved by The Dayton Foundation's Marketing and Public Relations department in advance. If media coverage is expected, please discuss this in advance with the responsible staff person for your fund. All fundraising materials should make clear that funds are being raised "for the benefit of the [name of fund], a component fund of The Dayton Foundation." The Foundation can provide you with a special logo for component funds at your request.

This policy also applies to any online activity that includes the name of your fund, such as event websites, fund websites, social media pages and online registration pages. The responsible staff person for your fund should be made aware of all online presence associated with your fund.

Silent and Live Auctions

If charitable deductions are desired for auction items, the items and their purchasers must be tracked using the Foundation's Tracking Auction Contributions spreadsheet and submitted to the responsible staff person for your fund.

Donors of auction items are responsible for providing the fair market value of these items, which should be displayed on the bid sheets. Only individuals whose winning bids are more than the stated fair market value may receive a tax deduction for their purchases. Acknowledgment letters provided for this purpose are split-gift acknowledgements and require use of an Event Fund, as well as the Tracking Auction Contributions spreadsheet.

An in-kind gift acknowledgement of a donated item may be provided at the donor's request. An in-kind acknowledgement letter states the item that was donated but does not include a dollar amount.

Raffles

There is no charitable gift involved in the purchase of a raffle ticket. No gift acknowledgement will be issued for money collected through this means.

Contact The Dayton Foundation

If you have questions or need additional information about these policies, please contact the responsible staff person for your fund. This will be The Dayton Foundation staff person who interacts with you most about your fund and who is listed on your quarterly fund statements.