



# RULES & PROCEDURES

**GIVING SEASON | AUGUST 1ST-SEPTEMBER 14TH**  
**RUN DAY | SATURDAY, SEPTEMBER 8TH, 10:00AM**  
[www.oldbills.org](http://www.oldbills.org)

## **ABOUT THE COMMUNITY FOUNDATION OF JACKSON HOLE**

For nearly 30 years, the Community Foundation of Jackson Hole has been making giving smarter, nonprofits more effective and our community stronger. The Foundation produces Old Bill's Fun Run each year, hosts professional development workshops, distributes grants through our Competitive Grants and Youth Philanthropy programs, helps donors establish philanthropic funds and manages over \$60 million in assets.

## **ABOUT OLD BILL'S FUN RUN**

Since 1997, Old Bill's has embodied Jackson Hole's generous spirit, with one out of every three households participating. The first of its kind in the nation, this collaborative fundraiser inspires thousands of people to donate millions of dollars to local nonprofits and has raised over \$146 million in twenty-one years. It began with the selfless philanthropy of Mr. and Mrs. Old Bill, who provided the initial \$500,000 Challenge Grant. Every year since, they have invested a half-million dollars to match the community's donations. Mr. and Mrs. Old Bill are joined by Co-Challengers to increase the amount of matching dollars available to over \$3 million annually. Old Bill's Fun Run has made philanthropy a household word in Jackson Hole.

With a single gift to the Community Foundation during the Giving Season, donors contribute to as many nonprofits as they like, knowing these organizations will receive 100% of all gifts designated for them, as well as a partial matching grant from the Community Foundation. Funding from Mr. and Mrs. Old Bill, Co-Challengers and Friends of the Match is used to cover a 5% administration fee for producing Old Bill's, including administration, event management, marketing and staff-time, so that participation is free for nonprofits. In addition, 20% of the match pool is allocated to the Foundation's Competitive Grants program. Twice a year, nonprofits working in Teton County have an opportunity to apply for additional funding through this program.

Old Bill's Fun Run starts and ends at Town Square and includes timed and untimed 5K and 10K runs and a highly competitive Diaper Derby. Winners of each race receive prize money to donate to their favorite nonprofits. You do not need to run to donate, and you do not need to donate to run, but everyone is welcome to do both!

## **ABOUT THE CHALLENGE GRANT**

The Old Bill's Challenge Grant structure was developed to provide partial matching grants that broadly support all participating organizations, as described below.

- Gifts designated for specific organizations, up to \$30,000 per organizations, are eligible for a partial match.
- Fiscally sponsored organizations participate under the same, single \$30,000 cap of their sponsor.
- The percentage at which eligible designated gifts are matched is variable based upon the ratio of total eligible designated gifts to the total raised by the Community Foundation in matching funds.

## ELIGIBILITY

An organization must be a 501(c)(3), governmental entity, or faith-based organization or be fiscally sponsored by another qualifying organization. Fiscal sponsors must approve any organization they are sponsoring in writing. Related organizations may, at the discretion of the Community Foundation of Jackson Hole, be required to participate as a single organization and/or may only be eligible for one matching grant. Qualifying organizations may participate in either Old Bill's Fun Run or the Tin Cup Challenge, but not both. An organization must qualify as "local" pursuant to **any one** of the definitions below:

- An organization that predominantly works in or serves Teton County, WY, **OR**
- An official Jackson Hole/Teton County, WY chapter in good standing of a state/regional/national membership organization, with a local advisory board comprised predominantly of Teton County, WY residents, **OR**
- A state organization, with Teton County, WY representation on the board; at least one paid employee whose responsibilities are predominantly comprised of program work in Teton County, WY; and dedicated office space in Teton County, WY, **OR**
- A regional/national organization, with a board or local advisory board comprised predominantly of Teton County, WY residents; at least one paid employee whose responsibilities are predominantly comprised of program work in Teton County, WY; and dedicated office space in Teton County, WY.

## PARTICIPATION CRITERIA

Due to the complexity and size of Old Bill's Fun Run, the Foundation has developed the following rules and procedures to govern participation in the event and reserves the right to verify compliance. **Failure to comply may disqualify an organization from participating in Old Bill's Fun Run 2018, affect future participation and/or result in forfeiture of the matching grant.**

1. All organizations are to operate within the spirit of Old Bill's Fun Run: to function ethically and honestly with mutual respect in order to promote community harmony.
2. Funds raised through Old Bill's Fun Run:
  - May only be used for non-religious, charitable programming.
  - May only be used to benefit Teton County, Wyoming. Programs must take place in Teton County, WY.
  - May not be used for political activity or lobbying.
3. Matching Grant Funds:
  - May not be endowed.
  - May not be subsequently granted to another participating organization.
  - Must be used within 18 months from issuance of grant checks in accordance with approved Old Bill's Use of Funds statements, and must be returned to the Foundation if they are not used.
4. The Community Foundation mails the Old Bill's brochure to Old Bill's donors for the past three years to all Teton County, Wyoming and Idaho donors. Please do not mail brochures or donor forms to Teton County addresses.
5. Official entry and donor forms are available at local banks, businesses, participating nonprofits, the Chamber of Commerce, the Foundation's offices and oldbills.org during the Giving Season.
6. All contributions received through Old Bill's Fun Run are subject to the Community Foundation of Jackson Hole's variance power: meaning that the Foundation's board of directors shall have the power to modify or eliminate any restriction, condition, limitation or trust imposed with respect to any funds or property the title to which has become vested in this corporation if, in the sole judgment of the Board of Directors, such restriction, condition, limitation or trust becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the community or area served.
7. Participation does not guarantee that organizations will receive funds.

## DEADLINES & MANDATORY MEETINGS

- ❑ **KICK-OFF MEETING: May 1st, 9:00am at Hansen Hall** – Mandatory for new organizations and organizations that did not participate in 2017. Attendance is strongly encouraged for organization representatives new to Old Bill's.
- ❑ **APPLICATION DEADLINE: May 18th** – Nonprofits must submit applications by this date, including prior year grant reports and documentation of fiscal sponsorship, if applicable, to be included in printed marketing materials.
- ❑ **APPLICATION DEADLINE (NO MARKETING): August 3rd** – Final deadline for nonprofit participation in Old Bill's. Nonprofits meeting this deadline will not be in printed marketing materials.
- ❑ **MANDATORY BOOTH MEETING: August 15th, 8:30 am at Teton County Library** – Nonprofits that want to host informational booths around Town Square on Run Day must attend this meeting.
- ❑ **MANDATORY AWARDS PARTY: October 22nd, 5:00pm at National Museum of Wildlife Art**— Celebrate all that Old Bill's does for our community and leave with your organization's check! Representatives from participating nonprofits must attend to pick up grant checks. Failure to pick up a check will result in forfeiture of the matching grant.
- ❑ **MANDATORY GRANT REPORT:** Old Bill's Fun Run 2018 Grant Reports are due in Spring of 2019 and must be submitted with the 2019 Old Bill's application. The Grant Report is used to ensure that organizations use their Old Bill's Fun Run grants according to the approved Use of Funds. Grant Reports are also used to document the community impact of Old Bill's Fun Run to the public, donors and the media.

## CONTRIBUTIONS

1. Gifts are accepted during Old Bill's Giving Season, August 1st–September 14th at 5:00pm. Contributions received after September 14th will be returned.
2. Organizations are responsible for soliciting donations on their behalf.
3. Contributions must be 100% tax deductible.
4. Organizations should not collect contributions to be pooled and delivered or mailed to the Foundation. Donors should mail or deliver their contributions accompanied by an official donor form to the Foundation's offices.
5. Organizations may only solicit donations from Co-Challengers if they are previous supporters.
6. Organizations should not provide tax receipts for contributions made through Old Bill's. Donations must be made through the Community Foundation of Jackson Hole, and the Foundation accordingly provides all tax receipts. Organizations are encouraged to acknowledge contributions as appropriate.
7. **Eligible contributions include:** Checks (made out to the Community Foundation of Jackson Hole and accompanied by an official donor form); online credit card gifts at [oldbills.org](http://oldbills.org); corporate matching grants received by the deadline; gifts of stock. Please contact the Foundation to donate securities.
8. **Ineligible contributions include:** Gifts in exchange for goods or services including, but not limited to: Event Proceeds including funds raised by a participating organization through raffles, drawing, auctions or other events; Fees including admission, registration, tickets or any type of non tax-deductible payment; Membership dues; Tuition; Pledge payments (gifts cannot be made to fulfill a legally binding pledge agreement).

## GIFTS

The Community Foundation provides gift information to organizations through a web-based platform called Donor View, where users can pull gift reports. The contact person for approved participants is emailed a username and password for their Donor View account along with instructions for using it. Gift reports include donor names, addresses, gift amounts and restrictions (if any) that donors provide to the Foundation.

1. Gift reports can be accessed for free as often as needed 24 hours a day via the internet.
2. The Community Foundation only provides password information and assistance to an organization's contact person; the contact person is responsible for distributing the password as appropriate.
3. Gift reports are available only via Donor View. The Foundation does not print, email or provide verbal Gift reports.
4. Details about gifts are available only after review and approval is complete, which may not occur chronologically.
5. Gift entry and adjustments may continue through October 22, 2018.

## MARKETING & USE OF LOGOS

To promote cohesive marketing for Old Bill's and help donors associate organizations with the opportunity for matching grants, the Community Foundation provides Old Bill's logos to each organization's contact person once their application has been accepted. Logos are also available at [oldbills.org](http://oldbills.org) and can be used in black and white or color from when organizations are accepted through the end of the Old Bill's Giving Season. Do not alter the logo—preserve original colors and always place it upright.

**Acceptable references to Old Bill's Fun Run and the Community Foundation include:** Old Bill's Fun Run for Charities 2018; Old Bill's Fun Run 2018; Old Bill's Fun Run; Old Bill's; Community Foundation of Jackson Hole and Community Foundation.

**Unacceptable references to Old Bill's Fun Run and the Community Foundation include, but are not limited to:** OBFR; OBR; OBFR 2018; OBR 2018; Fun Run; CFJH and CFJ.

**Informational Reminders:** In promotional collateral, organizations are encouraged to include the following:

1. Old Bill's Fun Run is Saturday, September 8, 2018 at 10am on Town Square.
2. Donors are encouraged to designate gifts to more than one organization with a single contribution.
3. Organizations receive 100% of all gifts designated for them, and matching grants from the Foundation.
4. Contributions on behalf of participating organizations must be accompanied by donor forms and made directly to the Community Foundation of Jackson Hole.

## RUN DAY BOOTHS

1. Run Day Booth locations will be determined at the mandatory booth meeting on August 15th. Organizations choose booth locations based on the order in which applications are received.
2. Organizations may not display or distribute religious or political materials or information on programs or activities that are ineligible for Old Bill's funding.
3. For safety reasons, driving on the event site is prohibited at all times.
4. No financial transactions or selling of goods or services are permitted at Old Bill's. If donors wish to support your organization on Run Day, please direct them to the Donations and Information Tent to make gifts.
5. Detailed rules and information about booth hosting will be provided at the Booth Meeting on August 15th.

## STILL HAVE QUESTIONS?

Contact:

- Annie Riddell, Old Bill's Fun Run Coordinator about booths and Run Day: [ariddell@cfjacksonhole.org](mailto:ariddell@cfjacksonhole.org)
- Pam Sather, Finance Officer about applications: [psather@cfjacksonhole.org](mailto:psather@cfjacksonhole.org)
- Susan Scarlata, Communications & Marketing Officer about marketing: [sscarlata@cfjacksonhole.org](mailto:sscarlata@cfjacksonhole.org)
- Amy Wheeler, Vice President - Philanthropic Services about donations: [awheeler@cfjacksonhole.org](mailto:awheeler@cfjacksonhole.org)

The Community Foundation of Jackson Hole's website [cfjacksonhole.org](http://cfjacksonhole.org) and/or [oldbills.org](http://oldbills.org) has comprehensive information for donors and nonprofits. Organizations can access updated information about Old Bill's including upcoming deadlines, Old Bill's Fun Run logos, donor forms and Rules & Procedures.

**OLD BILL'S FUN RUN IS A PROGRAM OF THE COMMUNITY FOUNDATION OF JACKSON HOLE.**



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