



COMMUNITY FOUNDATION
OF JACKSON HOLE

RULES & PROCEDURES

**GIVING SEASON | AUGUST 1ST-SEPTEMBER 13TH
RUN DAY | SATURDAY, SEPTEMBER 7TH, 10:00AM
www.oldbills.org**

ABOUT THE COMMUNITY FOUNDATION OF JACKSON HOLE

For 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, distributes funds through various discretionary granting programs, hosts professional development workshops, helps donors establish philanthropic funds and manages over \$70 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 \$159 million in twenty-two 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 the match pool 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 5.5% administrative 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.

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.

- Up to \$30,000 in gifts designated for specific organizations are eligible for partial matching grants.
- Fiscally sponsored organizations participate under their sponsor's \$30,000 cap.
- The match percentage is variable and based upon the ratio of total eligible designated gifts to the total the Community Foundation raises in matching funds.

ELIGIBILITY

An organization must be a 501(c)(3), governmental entity, faith-based organization or be fiscally sponsored by another qualifying organization. Fiscal sponsors must approve any organization they are sponsoring in writing. At the discretion of the Community Foundation of Jackson Hole, related organizations may be required to participate as a single organization and/or may only be eligible for one matching grant. Qualifying organizations can 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.

RULES

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 2019, affect future participation and/or result in forfeiture of matching grants.**

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 of receipt of grant checks in accordance with Old Bill's rules and must be returned to the Community Foundation if unused.
4. Participating nonprofits should not mail brochures to Teton County addresses. The Foundation mails the brochure to the last 3 years of Old Bill's donors in Teton County WY and ID. Organizations may not send boxholder mailings, postal patron mailings or solicit by purchasing mailing lists. Door-to-door solicitations and cold-call telephone solicitations are prohibited. Nonprofits may only conduct targeted solicitations for Old Bill's.
5. Official donor forms are available at local businesses, banks, nonprofits, the Chamber of Commerce, the Foundation's office 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: the Foundation's Board of Directors has 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 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 2018. Attendance is strongly encouraged for anyone new to Old Bill's, even if the organization has participated before.
- ❑ **APPLICATION DEADLINE: May 17th** – Nonprofits must submit applications by this date to be included in the Old Bill's brochure, including 2018 grant reports and documentation of fiscal sponsorship, if applicable.
- ❑ **APPLICATION DEADLINE (NO MARKETING): August 5th** – Final deadline for nonprofits to participate in Old Bill's. Nonprofits meeting this deadline will not appear in the Old Bill's brochure.
- ❑ **MANDATORY BOOTH MEETING: August 14th, 1:00pm 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 21st, 5:00pm at National Museum of Wildlife Art**— Celebrate what Old Bill's does for our community and leave with your organization's check! A representative for participating nonprofits must attend to pick up grant checks. Failure to pick up checks will result in forfeiture of matching grants.
- ❑ **MANDATORY GRANT REPORT:** Old Bill's 2019 Grant Reports must be submitted with the next year's Old Bill's application in the Spring of 2020. The Grant Report is used to ensure that organizations use their grants in accordance with Old Bill's rules and to document Old Bill's impact to the public, donors and the media.

GIFTS

1. Gifts are accepted during Old Bill's Giving Season, August 1–September 13 at 5:00pm. Contributions received after September 13th will be returned.
2. Organizations are responsible for soliciting donations on their behalf.
3. Contributions must be 100% tax deductible (no goods or services exchanged).
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 official donor forms, to the Foundation's office.
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 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 official donor forms); credit card gifts made online at 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 legally binding pledge agreements).

GIFT REPORTS

The Community Foundation provides gift information to organizations through a web-based platform called Donor View, where users can download gift reports. The contact person for approved organizations 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.

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. Gifts are entered in batches as they arrive in the Foundation's offices. Complete gift reports are available only after entry, review and approval is complete. Until all gifts are entered, usually around mid-October, gifts may not appear entirely chronologically. Gift entry and adjustments may continue through October 21, 2019.

MARKETING & LOGOS

To promote cohesive marketing for Old Bill's and help donors associate organizations with the matching grant opportunity, the Community Foundation provides Old Bill's logos to each participating organization's contact person after applications are approved. Logos can be used in black and white or color from when organizations are accepted through the end of the Giving Season. Do not alter the logo—preserve original colors and always place it upright. Logos will also be available at oldbills.org.

Old Bill's Brochure & Donor Form: Up to 200 brochures will be available to participating nonprofits on a first-come first-serve basis starting August 1st. Singular donor forms will not be available in bulk but will be available for download on the Foundation's website.

Acceptable references to Old Bill's Fun Run and the Community Foundation include: Old Bill's Fun Run for Charities 2019; Old Bill's Fun Run 2019; Old Bill's Fun Run; Old Bill's; Community Foundation of Jackson Hole and Community Foundation.

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

1. Old Bill's Fun Run is Saturday, September 7, 2019 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 gifts designated for them and partial 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 are determined at the mandatory booth meeting on August 14th. 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 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 14th.

STILL HAVE QUESTIONS?

Contact:

- Annie Riddell, Old Bill's Fun Run Coordinator about booths and Run Day: ariddell@cfjacksonhole.org
- Shelby Read, Program & Outreach Officer about applications: sread@cfjacksonhole.org
- Susan Scarlata, Communications & Marketing Officer about marketing: sscarlata@cfjacksonhole.org
- Amy Wheeler, Vice President - Philanthropic Services about donations: awheeler@cfjacksonhole.org

The Community Foundation of Jackson Hole's website cfjacksonhole.org and/or oldbills.org has comprehensive information for donors and nonprofits. Organizations can access updated information about Old Bill's including upcoming deadlines, 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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