



RULES & PROCEDURES

April 2021

Giving Season: August 13-September 17, 2021

Run Day: Saturday, September 11, 2021

oldbills.org

ABOUT THE COMMUNITY FOUNDATION OF JACKSON HOLE

For over 30 years, the Community Foundation of Jackson Hole has leveraged local philanthropy to make nonprofits more effective and our community stronger. The Foundation produces Old Bill's Fun Run annually, distributes funds through various discretionary granting programs, hosts professional development workshops, helps donors establish philanthropic funds, and manages nearly \$90 million in assets. Learn more at cfjacksonhole.org.

ABOUT OLD BILL'S FUN RUN

Since 1997, Old Bill's has embodied Jackson Hole's generous spirit, with one out of every three local households participating. The first of its kind in the nation, this collaborative philanthropic initiative inspires thousands of people to donate millions to local nonprofits and has raised over \$189 million in 24 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. Celebrating its 25th birthday this summer, Old Bill's 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 the 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. Nonprofits working in Teton County can apply annually for additional funding through this program.

In a typical year, Old Bill's Fun Run starts and ends at Town Square and includes a 5K and 10K run/walk, as well as a highly competitive Diaper Derby. Winners of each race receive prize money to donate to their favorite nonprofits. Of course, pandemic times are anything but typical! Decisions about how to safely celebrate Old Bill's 25th anniversary are subject to public health metrics and guidelines. Please visit oldbills.org for details and updates this summer.

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) in good standing, governmental entity, faith-based organization or be fiscally sponsored by another qualifying organization. Fiscal sponsorship must be acknowledged in writing by the sponsoring



entity. 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 may participate in either Old Bill's 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, the Community Foundation has developed the following rules 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 2021, affect future participation, and/or result in forfeiture of matching grants.

- All organizations are required to operate in the spirit of Old Bill's: to function ethically and honestly with mutual respect to promote community harmony.
- Funds raised through Old Bill's:
 - May only be used for non-religious, charitable programming.
 - May only be used to benefit Teton County, WY. Programs must take place in Teton County, WY.
 - May not be used for political activity or lobbying.
- 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.
- 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 Counties, WY and ID. Organizations may not send boxholder or postal patron mailings, nor solicit by purchasing mailing lists. Door-to-door solicitations and cold-call telephone solicitations are prohibited. Nonprofits may only conduct targeted solicitations.
- Official donor forms are available at local businesses, banks, nonprofits, the Foundation's office, and oldbills.org during the Giving Season.
- All contributions received through Old Bill's 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.
- Participation in Old Bill's does not guarantee organizations will receive funds.

DEADLINES & MANDATORY MEETINGS

- **Orientation Meeting:** April 29, 1-2pm via Zoom – Mandatory for new organizations and organizations that did not participate in 2020. Attendance is strongly encouraged for anyone new to Old Bill's, even if their organization has participated before.



- **Application Deadline:** May 14, 5pm – Nonprofits must submit applications by this date to be included in the Old Bill’s brochure, including 2020 Old Bill’s grant reports and documentation of fiscal sponsorship, if applicable.
- **Make-up Orientation Meeting:** August 5, 1-2pm – Mandatory for new organizations that missed the April 29 Orientation Meeting. Please email ariddell@cfjacksonhole.org to RSVP for this meeting.
- **Application Deadline (no marketing):** August 13, 5pm – Final deadline for nonprofits to participate in Old Bill’s. Nonprofits meeting this deadline will not appear in the Old Bill’s brochure.
- **Mandatory Awards Party:** October 25. Details to be announced based on public health metrics and guidelines.
- **Mandatory Grant Report:** Old Bill’s 2021 grant reports must be submitted with next year’s Old Bill’s application in the spring of 2022. Grant reports are used to ensure that organizations use their grants in accordance with Old Bill’s rules, approved use of funds, and any donor restrictions and designations. They are also used to document the event’s impact for donors, the community at large, and the media.

GIFTS

- Gifts are accepted during Old Bill’s Giving Season: August 13-September 17 at 5pm. Contributions received after September 17 will be returned.
- Organizations are responsible for soliciting donations on their behalf.
- Contributions must be 100% tax deductible (no goods or services exchanged).
- 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, directly to the Foundation.
- Organizations may only solicit donations from Co-Challengers if they are preexisting supporters.
- Organizations should not provide tax receipts for contributions made through Old Bill’s. Donations are made to the Community Foundation of Jackson Hole, and the Foundation provides all tax receipts. Organizations are encouraged to acknowledge contributions as appropriate.
- **Eligible** contributions include:
 - Checks (payable to “Community Foundation of Jackson Hole” and accompanied by official donor forms)
 - Credit card gifts made online at oldbills.org
 - Donor advised fund and corporate matching grants received by September 17
 - Gifts of stock (please direct donors to contact the Foundation to donate securities)
- **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.
- Gift reports can be accessed online for free as often as needed, 24 hours a day.
- 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.
- Gift reports are available only via Donor View. The Foundation does not print, email, or provide verbal reports.

- Gifts are entered in batches as they arrive in the Foundation's offices. Gift information is only available after entry, review, and approval is complete. New gifts may not appear in Donor View in chronological order.
- Gift entry and adjustments may continue through October 25, 2021.

MARKETING & LOGOS

To promote cohesive event marketing and help donors associate organizations with the matching grant opportunity, the Community Foundation emails the Old Bill's logo suite to each organization's contact person after applications are approved in early July. Logos are also available for download at oldbills.org. They may be used in black and white or color from the time organizations are accepted through the end of the Giving Season. Do not alter the logo; preserve original colors and always position it upright.

Acceptable references in marketing materials: Old Bill's; Old Bill's 2021; Old Bill's Fun Run; Old Bill's Fun Run 2021; Community Foundation of Jackson Hole; Community Foundation.

In their promotional materials, organizations are requested to include the following:

- Donors are encouraged to designate gifts to more than one organization with a single contribution.
- Organizations receive 100% of gifts designated for them and partial matching grants from the Foundation.
- Contributions on behalf of participating organizations must be accompanied by official donor forms and made directly to the Community Foundation of Jackson Hole.
- Visit oldbills.org for details and updates on Old Bill's 2021 festivities.

Old Bill's Brochure & Donor Form: Up to 200 brochures are available to participating nonprofits on a first-come, first-serve basis starting August 13. Singular donor forms can be downloaded from oldbills.org.

OLD BILL'S QUESTIONS

As needed, feel free to contact Community Foundation Staff with questions on the following:

- Marketing and outreach: [Anne Bradley](#)
- Events and related logistics: [Suzanne Rees](#) and [Annie Riddell](#)
- Donor View, cash, check and credit card gifts, gift reporting: [Erin Lusins](#)
- Grantee View, Old Bill's application: [Cindy Corona](#)
- Stock gifts: [Amy Wheeler](#)

To ensure receipt of important Old Bill's communications, all of which are sent via email, please identify the domain cfjacksonhole.org as a **“safe sender”** in your email provider.

The Community Foundation'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 is a program of the Community Foundation of Jackson Hole.