



## WHAT ARE THE BENEFITS OF CCF'S FUNDRAISING POLICIES?

At CCF, we acknowledge that donors and fund advisors may wish to fundraise in order to increase their fund's assets in furtherance of a charitable purpose. The policy herein describes the parameters and procedures for fundraising on behalf of your CCF fund. Fundraising activity requires additional oversight to ensure compliance with IRS regulations and guidelines. CCF has created this policy to protect your fund and your charitable intent along with the approximately 1,600 charitable funds and legacies that we administer and preserve.

## PERMISSIBLE ACTIVITIES

CCF permits passive marketing of funds and their charitable purpose. This may include the creation and distribution of marketing materials such as fliers, brochures or appeal letters requesting support from friends and associates. Promotional materials can include a link to a dedicated page on CCF website where individuals can make secure contributions. In addition, fundholders can apply to other corporate or private foundations for grants to be applied to a specific CCF fund.

## DISALLOWED ACTIVITIES

CCF does not permit any funds to use CCF's tax-exempt status to hold fundraising events. Such activities include, but are not limited to, dinners, galas, raffles, contests, auctions, golf tournaments, walkathons and car washes. CCF will not accept, deposit or process any contributions from a fundraising event. Even if participants of such a fundraising event were told they would not receive a tax deduction for their contribution, CCF will not take these contributions.

## at a glance

### Fundraising

- Learn about best practices for fundraising
- Distinguish between permissible and prohibited fundraising practices
- Understand any policies that may affect your fundraising goals for your fund

## CONSIDERATIONS

- **Promotional Materials:** CCF must give advance approval of all promotional materials that will be used to solicit donations. All materials must clearly state that your fund is a "component fund of the California Community Foundation." If contributors wish to donate to your fund via credit card, upon entering their credit card information online, there must be a clearly marked statement that "Your credit card purchase will be listed on your statement as a charge by the California Community Foundation."
- **Processing Contributions:** Individuals or entities who wish to give to your fund may donate directly to the foundation, making the check payable to California Community Foundation and indicating your fund's name in the check memo line. These checks may be mailed directly to our main address. The contributor will then receive an acknowledgement letter for tax purposes.
- **Online Giving Pages:** CCF's online giving pages can offer affiliates, friends, family and other interested parties information about your fund's charitable purpose, grantmaking activity and any other news items you may wish to disclose to possible contributors. In order to establish an online giving page at CCF, please contact Donor Relations at (213) 239-2300 or by email at [donorrelations@calfund.org](mailto:donorrelations@calfund.org) for additional information. At this time, CCF funds may not participate in online giving sites operated by other organizations.

## CONSIDERATIONS, CONT.

- **Grant Applications:** Any grant application, form or agreement must be reviewed, approved and executed by the foundation. Fundholder(s) should notify CCF at least one month before a grant application is due, to allow for appropriate review internally. In addition, the fundholder(s) will be responsible for any reporting requirements that result from a grant received by another foundation or entity. The foundation has the right to refuse to be a party to any grant agreement.
- **Contact Us:** Rely on CCF expertise to help you evaluate whether or not a fundraising idea falls within our policy. Provide us with all relevant information, and we will help assess the best practice for achieving your charitable goals for your fund. CCF does not provide back-office administration for pre-existing foundations; our services are focused on providing guidance and strategies to make philanthropy easier and more efficient.

To learn more about CCF's **Fundraising Policies**, please contact a member of the **Donor Relations or Grants Management** teams at (213) 413-4130.

### IMPORTANT LEGAL DISCLOSURE

The information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice.

The California Community Foundation does not provide legal or tax advice. You should consult your tax advisor to properly determine the tax consequences of making a charitable gift to the California Community Foundation.

Contributions to the California Community Foundation represent irrevocable gifts subject to the legal and fiduciary control of the foundation's board of directors.

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SERFUND0818