

# Affiliate Giving Day Checklist



## Giving Day Checklist

- Our committee has read the Affiliate Policy and Procedure Manual.
- 6 weeks prior to the planned event, the attached Affiliate Giving Day Application Form has been submitted to the MCF Program Associate for Local Community Foundations.
- A meeting with MCF's LCF Program Associate is scheduled.
- Marketing materials for the event have been approved by MCF.

## Post-Giving Day Checklist

- Within 7 days of the event, the Affiliate has reached out to MCF with all donor information and donation amounts collected during the event.
- We have identified in which fund the revenue from the Giving Day event should be placed.

# Affiliate Giving Day Application Form



Please complete and submit this application to MCF no later than 6 weeks before your event. The application must be approved, and a meeting with the LCF Program Associate scheduled before your affiliate generates any event materials. Should you have any questions, please contact Maggie Sullivan at [Maggie@mtcf.org](mailto:Maggie@mtcf.org) or (406) 541-7409.

**Date:** \_\_\_\_\_ **Fund Representative:** \_\_\_\_\_

**Affiliate Name:** \_\_\_\_\_

**Proposed Name of Event:** \_\_\_\_\_

**Date of Event:** \_\_\_\_\_ **Online Event Platform:** \_\_\_\_\_

**Brief Description of Event:**

I (we) agree to use all disclosures as outlined by the LCF Affiliate Policy and Procedure Manual, to review all printed and promotional material with MCF staff before distribution, and to submit detailed donor records with all event proceeds and invoices. In addition, I (we) understand that in some cases, MCF may terminate an event for failure to comply with outline Giving Day event procedures.

Fund Representative Signature:

Date:

Meeting Scheduled?

Event Approved:

Program Associate Signature:

Date:

Note: If the Local Community Foundation is partnering with other foundations or organizations during their Giving Day, this must be noted above. Secondly, MCF has a minimum \$500.00 granting requirement per partnered organization or foundation. This means that if you are simply raising money for your foundation, your donations will go straight into your endowment; however, if you are partnering with another individual for your Giving Day, in order to meet your grantmaking minimum, you will need to have subsidized a \$500.00 per organization minimum per partner in your distributable. This will all be discussed during your meeting with the LCF Program Associate.