

HOST AFFILIATE RESPONSIBILITIES MATRIX

4-2-18 - Be Advised: This is thorough but may not be all inclusive, additional fee for service items may present during work engagement.

Host Provides	Affiliate Responsibility
Organizational Documents	
Nonprofit Status (501) (c) (3)	IRS determination letter available to you upon request
Organizational Policy and Procedure Compliance	Affiliate P&P; have general knowledge of all organizational P&P
Financial and Administrative Management	\$ All admin fees from ckcf and affiliate funds roll up to CKCF operations
Full Back Office Accounting (Greater Horizons)	At a Glance and Fact Cards from Graystone available at request, plus any additional info
Depository Account for all contributions	Monitor fund activity to ensure accuracy
Online Giving Platform (setup, licensure, maintenance PayPal/Braintree); other wiring or transaction fees	Deliver deposits with proper back up paperwork supporting deposits
Accounts Payable/Receivable Bookkeeping	\$ Transaction Fees passed to funds generally could be occasion as affiliate operating expense
Annual 990 filing	Complete necessary paperwork for compliance
Annual Independent Audit (Knudsen Monroe and Company)	Available on our website for any inquiries, also guidestar listing
Annual Report	Redacted version available upon request
National Standards Credentialing - Accredited since 2010	On website for access
Insurance - general, D&O, special events, cyber security, +	Affiliates MUST follow industry practice standards set forth by CKCF to maintain our compliance
Greater Investment Diversity: fund management and investing services - Graystone Consulting	Not outside insurance allowed, if additional insurance needed - coordinate through CKCF with Conrade Insurance Carrier at affiliate cost \$
Board to Board	CKCF investment services only
Board Contact Lists	Board/Staff Roster (Excel spreadsheets are maintained by Program Coordinator)
Support and Guidance for Advisory Boards; attending all meetings currently; may survey to determine need	Agenda and Minutes – Include Program Coordinator and Executive Director on all correspondence and provide at least annual transfer of files for e-storage in affiliate folder.
Affiliate Document Storage	Must provide to Bill if not local CKCF staff
CKCF - Affiliate Summit	Attend Affiliate Summit
Affiliate Agreement	
Donor Fund Agreement Construction	\$ could involved legal costs for some fund types
CKCF Staff available for attendance to Board Meetings	Affiliates to provide date and times of meetings to allow CKCF to arrange attendance, generally Program Coordinator attends and there are times no one from CKCF can attend but will provide necessary coaching or documents ahead of time with notice.
Training and Assistance	\$ Outside of general training and support Affiliate to costs for strategic planning or specialized training session
Event and Fundraising Oversight/Compliance	Provide event applications in timely manner
Professional Memberships	\$ Local Clubs and Association membership are affiliate responsibility' \$ KACF membership required by affiliates as part of affiliate agreement
Personnel	
Personnel Policy Administration	Adherence to policy if hire staff for local work
CKCF hires and pays for Executive Director, Program Officers - Grants & Scholarships, Program Coordinator/Affiliate Liaison, Office Manager	

Human Resources (payroll managment)	\$ Affiliate must have operating budget for payroll, simple IRA if opt in, bonus pay if provided and other office and support expenses
	\$ Laptop, Printer and upkeep
	\$ Other office expenses and registration fees
	\$ Mileage
Corporate Cellular Account - Verizon	\$ Cell Phone – Corporate Account Available (Affiliate assumes costs), \$40 cost to Affiliate Operating fund
Professional Development	\$ Attendance to KACF Conference, CF Express Training for Staff or Boards for Certification (\$150 pp) is cost to Affiliate \$
Organizational Technology	
Technology support and protection - attachment	\$ Responsible for costs for tech support of equipment (laptop, printer) - Use Tim Litwiller, contracted tech rep.
	\$ Required CKCF equipment for cloud access (365 Microsoft fee) and must be set up with CKCF security system
Software	
Donor Fund Software – Donor Central (Greater Horizons)	3 local affiliate board members can have access to affiliate division files/donors also have access
Community Force – Scholarship and Grant Application Software	Affiliate staff or board work closely with Program Officer Grants & Program Officer Scholarships
Crescendo Newsletter for donors and advisors - annual license	Affiliates promote link to register - board, donors, partners
Wufoo survey tool (grant follow ups, conflict/confidentiality, organizational surveys)	\$ Cost to affiliate if used beyond our required survey purposes
Legal	
Legal Counsel - Resources	\$ Legal Fees may be passed to local affiliate or fund
Marketing/Communications	
CKCF pays contractor on retainer for marketing support, website management, crescendo newsletter support and misc communications	
Marketing/Promotional Material & Resources	\$ Fee For service for promotional material design/development beyond basic package
* Logo design	Use affiliate logo as much as possible to identify as affiliate, not stand alone and support regional brand
*Master Brochure per Affiliate and annual Update	\$ Brochure Templates and design with 2 updates (CKCF offers templates and support, however local purchase or small quantity charge cost per page pricing back to operations or more updates will be at cost)
*Thank you note set up 1 x	\$ Printing thank you notes cost per page and paper materials (affiliates can print local)
CKCF FB, Twitter and Linked In accounts	Social Media accounts must have Marketing Associate and Executive Director as additional Administrators; local boosts are affiliate cost responsibility \$
Website Platform by Flinthill Designs Paid for by CKCF - All Affiliates have page at cost of CKCF	Updates to no cost page are affiliate responsibility to send to Executive Director and Marketing Associate in a word document format with all content and placement requests.
	\$ Additional Micro Website Option – Centralized Website Platform - cost and management at affiliate level
Stewardship	
Gift Acknowledgment Letters to donors w/gifts \$250+	All gifts responsibility of local affiliate to send thank you notes
CKCF provide presentations to local groups	Arrangements for gatherings, coordinate topics and audience
CKCF attend local donor development meet ups 1:1 or groups	Affiliate leaders open doors and participate in meeting with CKCF staff