



Central Kansas COMMUNITY FOUNDATION

Serving local community affiliates in Central Kansas

Fund Representative, Affiliate Board, Advisory Board Responsibility

Organizational Documents

IRS determination letter available to you upon request

Compliance with CKCF's organizational P&P and regulations

§ All admin fees from ckcf and affiliate funds roll up to CKCF operations

At a Glance and Fact Cards from Graystone available at request, plus any additional info

Monitor fund activity via online portal to ensure accuracy and provide thank you notes

Deliver all deposits to CKCF with proper back up paperwork supporting deposits. No affiliate or fund representative/advisor has authorization to have an external bank account.

§ Transaction Fees is passed to funds generally, could be occasionfor application to operating expense for some funds types.

Complete necessary back-up paperwork for compliance

Available on our website for any inquiries, also guidestar listing. CKCF completes one audit and one 990 filing for all component funds.

Redacted version available upon request. CKCF completes one audit and one 990 filing for all component funds. Made availabale on CKCF website for ease of access.

Affiliates and Fund Representatives/Advisors MUST follow industry practice standards set forth by CKCF to maintain our compliance

No outside insurance allowed, if additional insurance needed - coordinate through CKCF with Conrade Insurance Carrier if circumstance requires, this will be at Affiliate or Fund Representative/Donor cost §

CKCF investment services are provided in accordance to the Investment and Spending Policy of the foundation.

Board to Board

Provide updated Board/Staff Rosters in excel formate to CKCF

Agenda and Minutes – Include Community Liaison or designated staff and Executive Director on all correspondence and confirm annually with CKCF all files (minutes, brochures, collatoral, promotional materials, etc.) have been e-filed at CKCF.

Affiliate Boards attenda Annual CKCF-Affiliate Summit (not required for Fund Representatives, yet open for their attendance)

Affiliate and Fund Representatives/Advisors Agreement

§ Could involved legal costs for some fund types and modifications, costs could be on donor or fund.

Affiliate Boards and Advisory Boards are to provide date and times of meetings to allow CKCF to arrange attendance when warranted, generally Community Liaison attends or other CKCF deisgnee, always willling to provide necessary coaching or documents ahead of time with notice.

§ Outside of general training and support, Affiliates and Fund Representatives/Adviosrs may need to absorb costs for strategic planning or specialized training session

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REQUIRED: Provide event application via online form in timely manner (60 to 90 days before event preferred) There are activities that are not permitted. Work with CKCF before finalizing any event/activity.
\$ Local Clubs and Association membership are affiliate and fund responsibility' \$ KACF membership required by Affiliates as part of Affiliate agreement (this is not required by component funds)
Personnel
Adherence to policy if Affiliate Foundation hires staff for local work. All employees are legally CKCF employees.
\$ 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 Reimbursement
\$ Cell Phone – Corporate Account Available (Affiliate assumes costs), \$40 cost to Affiliate Operating fund
\$ Attendance to KACF Conference, CF Express Training for Staff or Boards for Certification (\$150 pp) is cost to Affiliate \$
Organizational Technology
\$ Responsible for costs for tech support of equipment (laptop, printer) - Use current vendor, contracted tech rep. Costs will go to Operating Fund of Affiliate
\$ Required CKCF equipment for cloud access (365 Microsoft fee) and must be set up with CKCF security system
Software
2 local Affiliate Board Members or Advisory Board Members can have access to Affiliate division files. Advisory Board Members have access to only funds under that umbrella. All component fund donors are provided ability to have access to their fund(s).
Affiliate staff or Affiliate or Advisory Board appointees work closely with Program Officer Grants & Program Officer Scholarships
Affiliates and Advisory Boards promote link to register - board, donors, partners. Customized highlights on achievements throughout Central Kansas service area.
\$ Cost to Affiliate if used beyond our required survey purposes. If a board member doesn't have email access, the local Board is responsible to assisting CKCF in obtaining a hard copy of compliance documents or surveys.
Legal - Safety - Financial
\$ Legal Fees may be passed to local affiliate or fund
\$ Costs for required background checks are the responsibility of the Advisory Board, the Affiliate or the volunteer. This may vary, coordinate with CKCF to ensure staff, volunteers or contractors are provided information about the background check process and expectations.
No petty cash funds are to be in place for any fund, affiliate or advisory board. However for the day of an event/activity that has been approved through the event application process, there may be occasion for a local volunteer to provide petty cash for a cash box. This shall following the accounting processes and have the party providing the cash initial on the donation tracking sheet along with another volunteer confirming amount placed in the cash box and then at the end of event/activity initial again the return of the cash to the volunteer that provided the cash. Both parties to sign it was returned.

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Marketing and Communications

See additional items in this section as additional costs are on the board or advisor.

\$ Fee For service for promotional material design/development beyond basic package

Comply with social media policy

Use affiliate logo as much as possible to identify as affiliate or fund, regional branding encouraged, can use external designer for development yet requires CKCF approval before use. \$

\$ Brochure Templates and design with 2 active revision with CKCF designer. CKCF offers templates and support. If created externally, requires CKCF approval before use. Production is Affiliate or Advisors responsibility. Some small quantity production can be done at CKCF office for a charge cost per page pricing. This will be taken from Affiliate Operations Fund or Advisors must make arrangement to pay. Additional revisions or productions are a fee for service.\$

\$ Printing thank you notes cost per page and paper materials (affiliates can produce/print local)

Social Media accounts must have Marketing Associate and Executive Director as additional Administrators; local boosts are affiliate cost responsibility \$ This applies if the name of the fund is used for Advisory Groups as well.

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

It is the responsibility of local Affiliates and Fund Representatives/Advisors to send thank you notes. These are not formal gift receipts for tax purposes. All those come through CKCF office

Arrangements for gatherings, coordinate topics and audience

Affiliate leaders open doors and participate in meeting with CKCF staff