Foundation Focus

Collegiate Edition

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We are the
DO GOOD SISTERHOOD

Foundation Overview

The Delta Gamma Foundation fosters lifetime enrichment for members, promotes Service for Sight and partners with the Fraternity to ensure the future of our sisterhood. Our dedicated members and friends make this mission possible through philanthropy, service and generous gifts to the Foundation, which fund our three areas of support: Individual Member Support, Training and Programming, and Service for Sight.

We are one Delta Gamma, but in accordance with Internal Revenue Code, the Foundation and Fraternity are two separate organizations. In 1951, the Delta Gamma Foundation was formed as a complement to the Fraternity, creating a vehicle for members to promote the educational interests and social responsibility referenced in Article II of the Fraternity Constitution. Each entity offers unique opportunities for our members to do good. To see how we are living out this motto, view our most recent annual impact report and 990 Report.

The Foundation is governed by the Delta Gamma Foundation Constitution and Articles of Incorporation. Six elected members, and three ex-officio members who serve concurrently while in the Fraternity Council positions of Fraternity President, Council Trustee: Fraternity Programming, and Fraternity Treasurer, lead the Delta Gamma Foundation to ensure the fulfillment of its philanthropic mission. The Foundation has a body of voting members who participate in an Annual Meeting to determine both the leadership and direction of the Foundation.

The Foundation Focus: Collegiate Edition contains ready-to-use information on topics relating to the Delta Gamma Foundation for collegians as we pursue our motto to do good. The Foundation is an umbrella over all of our membership, both collegians and alumnae, and has programs and areas of involvement that support all groups. This resource provides introductory guidance and resources for all Delta Gamma groups to engage meaningfully with the mission of the Foundation.

Thank you for your commitment to our philanthropy Service for Sight and for your support of your sisters. Together, we can do good and make an amazing impact. Should you have questions related to this resource or the information contained within, please use the contact list included at the end of this resource.

THREE AREAS
OF SUPPORT

Individual Member Support

Endowments and annual gifts allow the Foundation to provide merit-based undergraduate scholarships and graduate fellowships, and need-based scholarships. Crisis Grants provide funding for members experiencing dire financial need. Initiated members can apply for these scholarships, fellowships and grants through the Delta Gamma Foundation.

Merit-Based Undergraduate Scholarships and Graduate Fellowships

Scholarships reflect Delta Gamma's commitment to education through continuing investment in members seeking their undergraduate, graduate or professional degree. Scholarship/Fellowship funds are sent directly to the institution for educational expenses. Many chapters have scholarships established specifically for their chapter members. Information and electronic applications, including all required documentation, are accessible on the Delta Gamma website at www.deltagamma.org/ foundation/applications. Learn more about funding a merit-based scholarship or fellowship in the DG website library or click here.

MERIT-BASED UNDERGRADUATE SCHOLARSHIPS

- Delta Gamma Foundation merit-based scholarships are awarded on a competitive basis to qualified, initiated members pursuing undergraduate degrees.
- Candidates must have a 3.0 or higher cumulative GPA on a 4.0 scale or the equivalent.
- Applicants must be initiated by December 31 of the previous calendar year in order to be eligible. For example, if applications close March 1, applicants must have been initiated by December 31 to be eligible.
- Selection is based on scholastic excellence, Delta Gamma involvement, campus involvement, service, work experience and essays.
- Funds may not be used for Delta Gamma dues or expenses.
- Applications are submitted through SmarterSelect.
- Undergraduate merit-based scholarship applications are due annually by March 1. The award recipients are announced at the end of July.

MERIT-BASED GRADUATE FELLOWSHIPS

- Delta Gamma Foundation merit-based fellowships are awarded on a competitive basis to qualified, initiated members pursuing graduate/professional degrees.
- Selection is based on scholastic excellence, contributions to chosen field, past and current Delta Gamma activities and leadership roles in collegiate chapter and alumnae group, and campus and community involvement.
- Applications are submitted through SmarterSelect.
- Graduate fellowship applications are due annually by April 1. The award recipients are announced at the end of July.

Sisters Helping Sisters: Need-Based Scholarships

These awards are offered to collegiate members who have proven student loan debt and unmet financial need. Information and electronic applications, including all required documentation, are accessible on the Delta Gamma website at www.deltagamma.org/ foundation/applications.

- Each recipient is granted $2,500 paid directly to the college or university for credit to their account for educational purposes only. Learn more about funding a Sisters Helping Sisters: Need-Based Scholarship in the DG website library.
- Funds may not be used for Delta Gamma dues or expenses.
- Applications are submitted through SmarterSelect and grants will be made as funds permit.
- Applications will be accepted from current, initiated undergraduate members of Delta Gamma Fraternity in good standing.
- Applicants must have completed a minimum of two semesters or three quarters of college coursework (which generally means sophomore, junior or senior status).
- Applicants must have a 2.5 or higher cumulative GPA on a 4.0 scale or the equivalent.
- Applicants must have accepted financial aid from their college or university.
- While the application materials state that the deadline is April 1, the deadline varies according to when the individual applicant has begun the process. It is up to each applicant to monitor their progress and complete the application process within 30 days of starting it. Applications can be found at www.deltagamma.org/ foundation/ applications.

Crisis Grants

Delta Gamma Foundation Crisis Grants, established in 1996, help Delta Gamma members who find themselves in extreme financial need created by job loss, health crisis, natural disaster or other unexpected life circumstances. The process for receiving financial assistance is simple and confidential. The Foundation Board of Trustees Finance Committee and select Foundation staff members review all grant applications.

In order for the Delta Gamma Foundation to maintain its tax-exempt status under the Internal Revenue Code, grants are provided to assist members with basic necessities such as food, clothing, housing or extraordinary medical care not covered by insurance. Tuition assistance is provided through Sisters Helping Sisters: Need-Based Scholarships available from the Foundation. **Per capita and collegiate/alumnae dues, obligations or social fees and university Panhellenic fees are not eligible expenses.**

All applicants must complete the appropriate application and sign the certification statement. Additionally, applicants must be current with their collegiate or alumnae dues and in good standing with Delta Gamma Fraternity. Applications are accepted and evaluated on a continuous basis. Grant amounts are based upon funds available. If the Delta Gamma applicant is unable to complete this application, a family member, close friend, sponsor or guardian may assist in its completion.

Training and Programming

Delta Gamma creates cutting-edge programming to develop members' social responsibility, maintain their health and well-being, enhance their leadership skills, and exemplify Article II of the Delta Gamma Constitution, which states: "As provided in the Articles of Incorporation, the objects of this Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility, and to develop in them the best qualities of character." The Foundation provides annual grants to the Fraternity to provide funding for the development and implementation of the following training and programming initiatives, among others.

Training and Programming supports initiatives in the areas of:

Social Responsibility

Health & Well-Being

Leadership Development

Delta Gamma Foundation Lectureships in Values and Ethics

The Delta Gamma Lectureships were established in 1992, when the late Dr. Paul Martin and Dotty Martin, Eta-Akron, contributed three $50,000 grants (The Dorothy Garrett Martin Challenge Grants) to the Foundation in recognition of their 50th wedding anniversary. Paul and Dotty's alma mater and the home of Delta Gamma's oldest active collegiate chapter, the University of Akron, was the site of the inaugural Lectureship. Today, there are 21 campuses with a Lectureship and a Convention Lectureship.

Much of the programming sponsored by the Foundation focuses on personal development. Lectureships in Values and Ethics speak to the very heart of Delta Gamma's purposes.

Established Lectureships are as follows:
- American University
- DePauw University
- Duke University
- Indiana University
- Louisiana State University
- Mississippi State University
- Purdue University
- Roanoke College
- Southern Methodist University
- Texas Christian University
- Texas A&M University
- University of Houston
- University of Michigan
- University of Akron
- University of Missouri
- University of North Dakota
- University of Oklahoma
- University of Southern California
- University of Texas
- University of Washington
- Wichita State University
- Convention Lectureship

At this time, new lectureships are not being established. Please see the Foundation Policies. Lectureship resources, including the current schedule, can be found in the website library.

Service for Sight

In 1936, Eta-Akron chapter member Ruth Billow made a plea to the Convention body to adopt sight preservation and aid to those who are living with blindness or other vision loss as Delta Gamma's philanthropy. That shared philanthropic mission has become the cornerstone of our service and commitment to do good. Delta Gamma's philanthropy, Service for Sight, provides access and advocacy for those living with blindness or who have low vision. Promoting Service for Sight both through service and fundraising is a key piece of the Delta Gamma Foundation's mission. Service for Sight helps members live out our do good motto.

Service for Sight Grants

The Delta Gamma Foundation makes a significant impact for people living with blindness or who have low-vision by awarding grants to qualified organizations that are national in scope and share Delta Gamma's Service for Sight philanthropic mission. Organizations interested in receiving financial support in the form of a grant can apply each year; a link to grant applications is available on the Delta Gamma website. Canadian organizations are eligible to receive Service for Sight grants. Grant recipients for each year are posted on the [Delta Gamma website](#).

Chapters/groups can support local sight-related organizations by voting to direct a portion of their fundraising efforts or other gifts to a 501(c)(3) charity that shares our Service for Sight mission. Individual donors and groups can make gifts to the general Service for Sight fund.

Delta Gamma Schools for Children with Visual Impairments

The Foundation proudly supports the five Delta Gamma Schools for Children with Visual Impairments founded by Delta Gammas and supported by members through service and fundraising. Schools are supported through Service for Sight grants, and many alumnae groups and collegiate chapters choose to direct a portion of their fundraising proceeds to a Delta Gamma school of their choice.
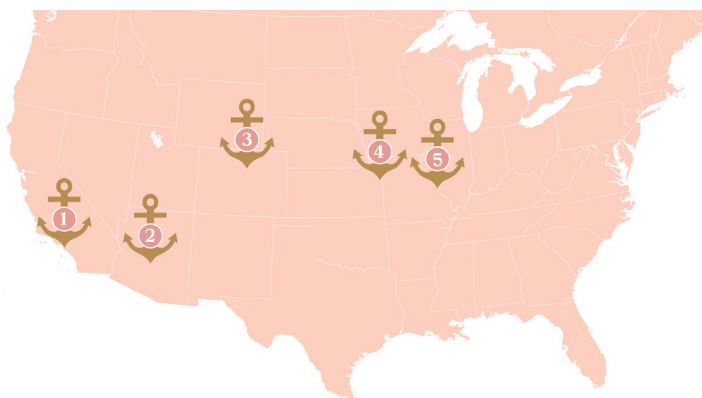
1. [Blind Children's Center](#), Los Angeles, CA
2. [Foundation for Blind Children](#), Phoenix, AZ
3. [Anchor Center for Blind Children](#), Denver, CO
4. [Children's Center for the Visually Impaired](#), Kansas City, MO
5. [Delta Gamma Center](#) St. Louis, MO

Delta Gamma Fellows

The American Foundation for the Blind's (AFB) yearly Service for Sight grant supports the Delta Gamma Fellows program to support students and advisers working in the field of blindness attend annual leadership and learning opportunities through AFB.

Do Good Hours

Service for Sight is our philanthropy and priority for both fundraising and volunteer service, but Delta Gamma recognizes all the ways in which collegiate members do good. All members are expected to complete volunteer service — to do as much good for our Service for Sight philanthropy and in your communities as your time, talents and treasure allow.

Do Good: Service for Sight Hours

include time spent supporting individuals who are blind or have low vision, promoting sight conservation, or volunteering with organizations whose philanthropic mission it is to support or advocate for individuals living with blindness or low vision.

Do Good: Non-Service for Sight Hours

include time spent volunteering in support of any outside, community-based organization or cause to which the member feels connected.

WHAT COUNTS AS DO GOOD HOURS

- Hands-on service
- Tabling to educate others about our Foundation and/or our philanthropy
- Advocacy for people who are blind or have low vision
- Any other interactive volunteer service

Purchasing or donating items, attending another chapter's philanthropy event, or attending a fundraiser for a cause do **not** count as service hours.

Did you …	**Yes,** I did one or more of these activities.	Log hours as **Do Good: Service for Sight**
• volunteer in support of a person or persons living with blindness or low vision? • volunteer with an organization that serves people who are blind or have low vision? • perform activities promoting sight conversation?	**No,** I did another type of service.	Log hours as **Do Good: Non-Service for Sight**

RECOGNITION OPPORTUNITIES

- Individual chapter leadership and vp: Foundation can brainstorm ideas to reward members who go above and beyond their Do Good Hours each year.
- Delta Gamma will continue to recognize chapters for their devotion to Service for Sight volunteer service and fundraising through annual Foundation awards.
  - Regional Foundation Award for Collegiate Chapters, Excellence in Philanthropy: Service (based on Do Good: Service for Sight Hours)
- Delta Gamma will recognize chapters for their Do Good Hours through biennial Foundation awards.
  - H.K. Stuart Spirit of Service Award is presented every Convention year and recognizes chapters that evidence the spirit of dedication and commitment to serving others and the personification of the Delta Gamma motto, do good, in every aspect.

VP: FOUNDATION/DIRECTOR OF SERVICE HOURS RESPONSIBILITIES

- Educate members to be able to share their personal Service for Sight stories with PNMs and understand the difference between Service for Sight and the Foundation by presenting the Foundation Education for Recruitment: Let's Talk Philanthropy workshop during recruitment prep week.
- Organize Do Good: Service for Sight Hours opportunities.
- Encourage members to complete the expected eight Do Good Hours per academic year.
- Help members track service hours.
- Maintain a record of both Do Good: Service for Sight Hours and Do Good: Non-Service for Sight Hours and complete the Log Do Good Hours task in Anchorbase.

Review the Collegiate Chapter Officers Manual (CCOM) for a complete list of service hours responsibilities.

TRACKING AND LOGGING DO GOOD HOURS

Whenever Delta Gammas participate in a volunteer service opportunity, they can submit their participation by filling out a one minute survey of their experiences from a smart phone, tablet or other device via Google Form. Tracking Do Good Hours helps us celebrate and recognize our members and chapters for all of the ways in which they do good for our Service for Sight philanthropy and other worthy causes.

- vp: Foundation/director of service hours will enter Do Good: Service for Sight Hours and Do Good: Non-Service for Sight Hours using a tracker (Google form or other tracking document) into the Log Do Good Hours task in Anchorbase five times throughout the year: October 15, December 15, February 15, April 15 and the last day of classes.

- If a member participates in a group service event, that member is responsible for submitting their own Do Good Hours using the Do Good Hours Google Tracking Form or other tracking process.

- To be eligible for Foundation service awards, an upload of current progress will need to be submitted in Anchorbase by April 15 every year.

- Do Good Hours completed over summer will be applied to the upcoming academic year.

- Work as a collegiate officer may not be counted as service hours.

How to Track Do Good Hours

The vp: Foundation can perform the following steps once each school year to set their chapter up for success in recording Do Good Hours throughout the year.

1. Your Regional Foundation Coordinator (RFNC) will notify you via email that you have access to the Do Good Hours Tracking Google Form. You may request access from your coordinator if you have not received an email.

2. Once you open the form, make a copy by selecting the option "Make a copy" from the forms editor options menu. You'll find this option by clicking on the row of three vertical dots to the right of the "send" button in the upper right hand corner of the page. Do not reuse and rename a previous year's tracking form.

3. When copying, you'll have the opportunity to rename the form. Highlight "Copy of My Chapter" and type in the name of your chapter, but keep the " Do Good Hours 2023-2024."

4. Click "okay" after changing the name of the form.

5. In order to share the form's location with members of your group or chapter, you'll need

to share the URL of the form you just copied and renamed.

6. Copy the form link by first clicking on the "Send" button in the upper right corner. From the "Send Form" pop-up window, select the link icon (the paperclip looking icon in the middle) and click on the "Shorten URL" box.
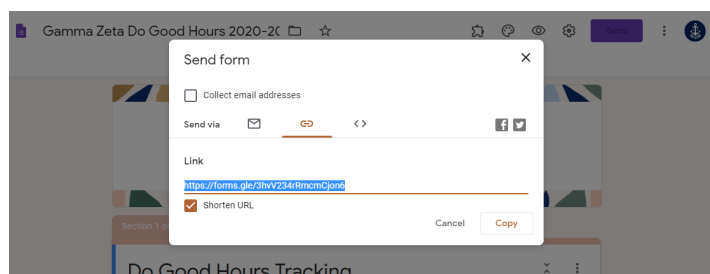
7. Save the link on your phone and/or computer somewhere that will be easy for you to find when members ask you for the link. You can share the link via text, email, or social media. You can also use the envelope icon to send yourself a link to the page via email.

How to Upload Service Hours into Anchorbase

1. Download your form responses into a .csv file by selecting this option from your form "Responses" tab. This will be a running list that is merely updated and uploaded each deadline. Do NOT use a separate tracker for each term.
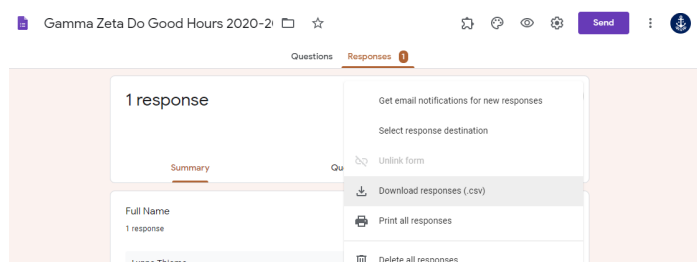
2. Log in to Anchorbase (Foundation > Tasks > Log Service/Awareness Hours). Click "Continue" on the next screen.

    Do Good Hours are reported five times throughout the year: October 15, December 15, February 15, April 15 and the last day of classes. This includes all Do Good: Service for Sight or Do Good: Non-Service for Sight group and individual hours rolled into one report.
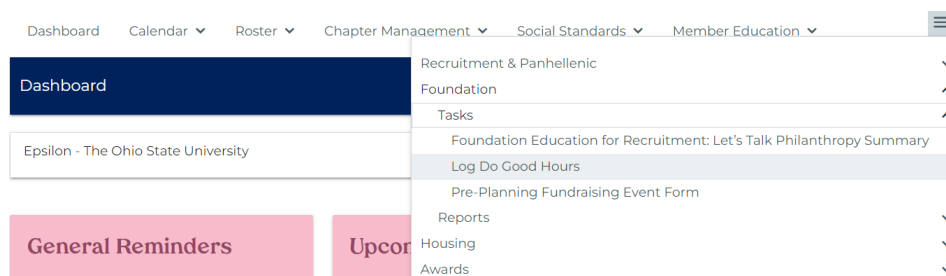
3. Select the current year's task below and click "Continue."

4. Section 1: describe the type of Do Good: Service for Sight activities your group completed.

5. Section 2: enter the total number of Do Good: Service for Sight Hours your group completed.

   Hours are cumulative, so you will enter your year to date hours in October, December, February, and April and then enter the full year on the last day of classes. Reporting the hours throughout the year is a check-in to show progress, but the last entry will total the entire year.

   Note: You will be able to fill this report in throughout the year to capture portions of data if you like to work that way. Just click on the orange "save" button on the right side of your screen to keep your work in progress.

6. Section 3: enter the number of membrers with 8 or more Do Good: Service for Sight Hours.

7. Section 4: enter the total number of Do Good: Non-Service for Sight Hours your group completed.

8. Section 5: upload your tracking spreadsheet. This must be an .xlsx or .csv file only, as the data may not be extracted from a PDF.

9. Once the form is completed, click "Continue."

10. Next is the validation step. The form will only be submitted when you proceed to the

validation step and submit. Scroll all the way to the bottom of the form. Type your name and the date to electronically sign after verifying the information is correct. Click "Continue" to proceed to the receipt page to make sure that the form was submitted correctly.

Type your name and date as shown to certify the information you entered is correct. Then click the blue "Continue" button.

First Name	Last Name	10/26/21
First Name	Last Name	10/26/2021

PREVIOUS   Step: Validation   CONTINUE
(Enter Information)   (Receipt)

11. Once you have started a form, you can return to that form by clicking the box in front of the form. This will allow you to save your work as you go.

Select	Key Field	Status	Date Submitted	Date Posted
☐	2020-2021			9/29/2020
✓	2021-2022	Last Saved by Name of Officer	10/26/2021	7/1/2021

PREVIOUS   Step: Selection   CONTINUE
(Overview)   (Enter Information)

COMPONENTS OF A SUCCESSFUL SERVICE PROGRAM

Motivating Members for Do Good: Service for Sight Hours

- Review and present information from the Foundation [Annual Impact Report](#) and information found on the Delta Gamma Foundation [website](#).
- Show the [Delta Gamma philanthropy video](#) at a meeting.
- Consult the Service for Sight organization [Google map](#) for organizations in your area that share our Service for Sight mission.
- Invite a person who is blind or who has low vision to speak to members of your group about living with low vision.
- Invite an eye care professional to speak about eye health and eye diseases.
- Invite a guide dog handler to come to the chapter and learn about meeting and working with guide dogs. Check out [guidedogs.com](#) for some advice on meeting a working guide dog team.
- Ensure that all members know sighted/human guide techniques so they are comfortable serving as guides. Check out [these techniques](#) to learn more.

Examples of Do Good: Service for Sight Hours Activities

Help someone who is blind or has low vision:

- Serve as a sighted/human guide and/or assist students with low vision. Check with the Student Services office on campus or with local schools for opportunities.
- Assist persons who have low vision with their correspondence, transportation and daily living chores or read to them, talk to them and play games with them.*
- Develop a supportive relationship with people at risk for vision loss such as the elderly living in a local retirement or assisted living facility.
- Install the [Be My Eyes](#) app and remotely assist people who are blind or have low vision.
- Teach others how to make their social media accessible by using [best practices](#) as recommended by AFB.
- Blind New World advocacy: [blindnewworld.org](#)
  - Create a blind awareness social change campaign to demystify blindness and break down the barriers to inclusion.
- Contact [Prevent Blindness America](#) to participate in glaucoma screening, vision screening and other programs.
- Serve as guide runners and guides during 5Ks, marathons, and other outdoor activities.
- Babysit or sponsor a special occasion party for children who are blind or have low vision.
- Recognize [White Cane Safety Day](#) on October 15.

Help an organization ([use this Service for Sight organization map](#)) that shares our Service for Sight mission by:
- Volunteering with guide dog organizations and helping raise guide dog puppies.
- Volunteering at schools for children who are blind or have low vision.

- Working with a local school for children who are blind to:
  - Make "touch and feel" books, musical/beeping eggs or other projects.
  - Host and facilitate a mock interview/resume building program for teenagers and adolescents.
  - Hold a braille spelling bee.
  - Assist with computer technology sessions, reading to the blind, or support in other daily tasks.
- Offering to help with administrative work for local agencies serving people who are blind or have low vision.
- Recording textbooks/audiobooks with Learning Ally.
- Offering to help with administrative work or fundraisers for local agencies serving people living with blindness or who have low vision.

Educate communities about Service for Sight, eye health, sight preservation, and the experiences of people living with blindness. Some examples include:

- Participating at campus or community health fairs by setting up a "Facts About Eyes" booth. Distribute information about blindness or other vision loss obtained from www.nei.nih.gov/nehep or Delta Gamma Foundation website.
- Assisting the Lion's Club with White Cane Safety Day vision screening.
- Spread education for the many vision and eye heath awareness months throughout the year by distributing brochures or starting a social media campaign.
- Order and print information to distribute from the National Eye Institute.
- Promoting eye health in your community: nei.nih.gov/learn-about-eye-health
  - Use materials from Think About Your Eyes for community outreach on vision health.
  - Check out Prevent Blindness for facts about Women's Eye Health.
  - To celebrate Louis Braille's birthday (January 4), pass out cupcakes and allow people to write their name in braille using a slate and stylus or with muffin tins and tennis balls. Braille games and more can be found at American Print House Braille Bug.
  - Download Prevent Blindness fact sheets to create an informative display for tabling.
  - Invite a guide dog organization to bring puppies to campus to make others aware of the process of training and placing a guide dog.

We do ask that all of our members be especially careful about the locations used for personal meetings and individual service opportunities. It is not recommended that the reading take place in chapter houses, suites or lodges. Location suggestions include: public places, student centers, restaurants and libraries. Volunteering at a person's home should only occur after a relationship has been well-established. In this case especially, members should always use the buddy system and never go alone.

REFLECTION AND RECOGNITION

As members engage in doing good for their communities, we are given the opportunity to remember the values we hold true as Delta Gammas. We encourage all members to take time to reflect after engaging in Do Good Hours and consider what you learned from those you served and how the opportunity contributed to your personal growth.

FAQs- Want to know more or still have questions?
Consult the Collegiate FAQs at the end of this resource or contact your Regional Foundation Coordinator (RFNC).

Sight-Related Holidays and Monthly Observances

You can learn more about the monthly observances at preventblindness.org or by visiting the website noted in the descriptions below. You are encouraged to share information about these holidays and monthly obvervances on your chapter's social media for education and awareness!

January

National Glaucoma Awareness Month
More than 2.2 million Americans age 40 and older suffer from glaucoma. Nearly half do not know they have the disease — it causes no early symptoms.

Braille Literacy Month

World Braille Day — January 4

February

AMD/Low Vision Awareness Month
Age-related macular degeneration is a leading cause of vision loss, affecting more than two million Americans age 50 and older. Low vision aids can make the most of remaining vision.

March

Workplace Eye Wellness Month
When it comes to eye health, the more vision ailments employees have, the more medical care they utilize, increasing healthcare related expenses.

World Glaucoma Week
World Glaucoma Week is a global initiative of the Wold Glaucoma Association (WGA). Visit worldglaucomaweek.org to find out the specific dates each year.

April

Women's Eye Health and Safety Month
Women often manage family health concerns. Do you know how to protect your sight? Hormonal changes, age and smoking can endanger sight.

International Guide Dog Day — Last Wednesday in April
#GuideDogDay

May

Ultraviolet Awareness Month
Exposure to UV rays can burn delicate eye tissue and raise the risk of developing cataracts and cancers of the eye. Protecting your eyes from UV dangers and choosing the right sunglasses will be the topic of the month.

June

Cataract Awareness Month
Cataract is the leading cause of blindness in the world. There are close to 22.3 million Americans age 40 and older with cataracts. More than half of all Americans will have cataracts by age 80.

National Sunglasses Day — June 27
nationalsunglassesday.com
#NationalSunglassesDay #SunglassSelfie

July

Dry Eye Awareness Month
Nearly 16 million Americans have dry eye, which in severe cases, may cause serious vision problems.

Fireworks Safety Awareness Week — June 28-July 4

August

Children's Eye Health and Safety Month
Healthy vision contributes to children's school readiness, ability to learn, overall healthy development and ability to reach motor developmental milestones and that vision screening and eye care are essential.

September

Sports Eye Safety Month
There are thousands of eye injuries a year related to sports and hazards around the house.

National Guide Dog Month
Guide dogs can make a profound difference in people's lives. This month serves as a celebration of all the wonderful work guides dogs have done.

October

Blindness Awareness Month
Every October, Blindness Awareness Month brings a heightened focus on the blind and low-vision community and the realities of living without sight.

World Sight Day — Second Thursday of October

White Cane Awareness Day — October 15

November

Diabetes-Related Eye Disease Month
According to the National Eye Institute, over seven million Americans are impacted by diabetic retinopathy, a condition involving chronic high blood sugar that damages the retina's blood vessels.

December

Give the Gift of Sight Month
Prevent Blindness has declared December as "Give the Gift of Sight Month," asking the public to reflect on the joys of healthy vision and give back financially.

FOUNDATION FUNDRAISING AND GIVING

INCLUDING ANCHOR SPLASH® AND ANCHOR GAMES

Collegiate Chapter Fundraising

Since our founding in 1873, Delta Gammas have had a strong desire to help others, as evidenced by our motto, do good. Today, the Delta Gamma Foundation creates meaningful experiences and impacts the lives of our members because of the financial generosity of donors. Individuals, collegiate chapters and alumnae groups make gifts to the Foundation which in turn are used to fund our three areas of support: Individual Member Support, Training and Programming and Service for Sight. Collegiate chapter fundraising events are a vital pillar upon which the Foundation fulfills its mission.

Types of Gifts

- **One-time gifts**: Make a gift online at donate.deltagamma.org, by mail or by phone.
- **Tribute gifts**: Make donations to any Foundation fund in honor or memory of someone special, as well as to sponsor a scholarship or fellowship. The Foundation will notify the honoree or the family of those memorialized.
- **Scholarships and fellowships**: Many collegiate chapters choose to endow a scholarship or fellowship or fund a one-time scholarship or fellowship. Please consult the resources in the Delta Gamma website library for more information on how to endow a scholarship or fellowship.

Directing Chapter Gifts to the Foundation

SUBMITTING YOUR FUNDRAISING PROCEEDS TO THE FOUNDATION

Collegiate chapters can direct their fundraising proceeds to a specific Delta Gamma Foundation fund or purpose. However, gifts to the Loyalty Fund, which funds the areas of greatest need and our three areas of support, allow the Foundation to address the emerging or immediate needs of Delta Gamma's membership and constituents.

By submitting your fundraising proceeds to the Foundation, you are offered a way to direct up to 50% to a local 501(c)(3) not-for-profit philanthropic organization that shares Delta Gamma's mission of sight preservation and assistance to those who are living with blindness or low vision. However, we encourage our chapters to consider designating more than 50% to the Delta Gamma Foundation's Loyalty Fund which truly supports all Foundation areas of support for our collegians and alumnae.

Collegiate chapters will receive credit for 100% of their fundraising proceeds submitted to the Delta Gamma Foundation. Giving credit is used to recognize chapters for chapter awards, Convention awards and provide year-round recognition.

Collegiate chapters will also receive 100% credit for the gift to their selected organization. The president, vp: finance and vp: Foundation will be notified when the gift has been sent to their selected organization.

Chapters may direct a portion of their gift whether their fundraisers are tax deductible or not. For more information, view the infographic on the following page.

Directing Chapter Gifts

1 — It starts with our members.
A collegiate chapter or alumnae group decides to hold a fundraiser to support the Foundation and a 501(c)(3) not-for-profit organization that shares our Service for Sight mission. **Collegiate chapters may direct up to 50% and alumnae groups may direct up to 90% of their net funds.** Fundraising event advertising should state: "proceeds will support both the programs of the Delta Gamma Foundation and the ABC charity."

2 — A fundraising event occurs.
Chapters are required to use memberplanet as an online fundraising vendor. Memberplanet will directly send donated proceeds to the Delta Gamma Foundation. Chapters receive giving credit for 100% of their net fundraising! Giving credit is used to recognize chapters for regional awards and Convention awards.

3 — Proceeds sent to the Foundation.
After holding a successful fundraiser, all proceeds (after expenses) are sent to the Delta Gamma Foundation along with the Fundraising Finance Report Form. If directing a portion of your gift to a 501(c)(3) organization that shares our Service for Sight mission, the report form must include the qualified organization's name and percentage or amount of the gift to be granted to the organization.

4 — Gift checks are issued. Checks to qualified organizations that share our Service for Sight mission are issued by the Delta Gamma Foundation along with a letter identifying the collegiate chapter or alumnae group as the sponsor of the gift through the Foundation.

5 — Gifts go back to our members.
The portion that remains with the Foundation contributes to our three areas of support: Individual Member Support, Training and Programming, and Service for Sight. Many of these programs directly benefit our membership, allowing the hard work put into a fundraiser to come full circle. These programs include scholarships and fellowships and training and programming.

SELECTING AN ORGANIZATION

Chapters may designate up to 50% their net Foundation fundraiser proceeds to either a local or national 501(c)(3) non-profit organization that shares our mission of Service for Sight. The Foundation will only make gifts to these types of organizations.

Chapter membership must vote on which Foundation area of support they will choose to fund with their fundraising proceeds. ***This vote should occur BEFORE the fundraiser marketing starts, so that the chapter can accurately market the event.***

Fundraising event advertising should state: "proceeds will fund the Delta Gamma Foundation's areas of support and the ABC charity" (organization must share our Service for Sight mission).

Directed giving checks will not be sent out until the Foundation has received all monies from a chapter's fundraiser (via memberplanet and checks made payable to the Delta Gamma Foundation) and the chapter's 332 account in Greekbill is at a zero balance.

For more information about directing a portion of your fundraising proceeds to an organization that shares our Service for Sight mission, please reach out to your RFNC.

Tax-Deductible Fundraising

The Delta Gamma Fraternity and its chapters are formed under section 501(c)(7) of the tax code and as such, gifts to the Fraternity are not tax deductible. However, the Delta Gamma Foundation is formed under section 501(c)(3) of the tax code which allows donors to take a tax deduction for gifts to the Foundation, when allowed by law.

Donations, or a portion of donations, made to chapter Foundation fundraisers may be tax-deductible to donors if:
- All fundraising revenue is processed by the Delta Gamma Foundation for charitable purposes. Chapters cannot retain a portion of the proceeds for their own purposes. In order for the Foundation to maintain its tax-exempt status, it is essential this basic guideline be followed.

- Clearly state in all marketing and communications promoting the fundraiser who the proceeds are benefiting.
  - When promoting a fundraiser, you **can** say:
    - "Proceeds will fund the programs and services of the Delta Gamma Foundation"
    - "Proceeds will fund the programs and services of the Delta Gamma Foundation and the ABC local organization" (If directing a portion of your gift to a local 501(c)(3) that shares our Service for Sight mission).
  - You **cannot** say:
    - "Proceeds will support Alpha Beta chapter of Delta Gamma"
    - "Proceeds will support the Delta Gamma Fraternity"

- Donors must make checks payable to the Delta Gamma Foundation or donate online via memberplanet. The Foundation will send receipts directly to the donor gifts of $250 or above.

When fundraising, keep in mind:
- A donor must give something away in order for a gift to be tax deductible. For example, a cash donation, a purchased ticket to a dinner where the admission price exceeds the cost of the meal, goods or services to be sold or auctioned.
- The Foundation will reimburse your group for expenses with receipts up to the total amount of fundraising dollars raised.
  - Please note: the Foundation does not provide reimbursements for merchandise (E.g. apparel).
  - Record each expense on the Fundraising Finance Report Form (FFRF) and in Greekbill. Submit the form in Anchorbase. Make photocopies or take photos of all receipts for your records before mailing to the Foundation.
  - Mail copies of your receipts along with a printed copy of your FFRF and any checks made payable to the Delta Gamma Foundation to 3250 Riverside Drive, Columbus, OH 43221
- Collaborate with your vp: finance to complete the FFRF in Anchorbase. Both your signature and the vp: finance's signature are required to submit the form.
  - Email FoundationFinance@deltagamma.org to inform them of your submitted FFRF and include any receipts for reimbursement of expenses.

NON TAX-DEDUCTIBLE DONATIONS
In general, if a donor receives a good or service in exchange for a donation the donation is not tax deductible. Examples where donations may not be tax deductible include:
- desserts sold at events like Desserts with DG
- pizza sold at events like Slices for Sight or Pizza with Puppies
- sales of any items such as merchandise or apparel
- car washes

Net proceeds sent to the Foundation will still count toward the chapter's giving total, and chapters can still direct a portion of the proceeds to qualified 501(c)(3) organizations that share our Service for Sight mission. Donors, however, will not receive a tax deduction for their donations. Chapters should not make statements suggesting or stating donations are tax deductible.

For questions about whether donations to a fundraiser are tax deductible or not, contact the Foundation professional staff at Executive Offices.

Signature and Non-Signature Fundraising Events

Collegians are expected to hold a minimum of one Signature Foundation Fundraiser and one Non-Signature Foundation Fundraiser per academic year.

SIGNATURE FOUNDATION FUNDRAISERS

Signature Foundation Fundraisers are large-scale and easily identifiable fundraisers that require the full chapter membership when planning, participating and executing the fundraising event. These are normally tax-deductible fundraisers.

Examples:
Anchor Splash®
Anchor Games
Anchor Bowl
Anchor Slam
Anchor Spike
Anchor Dash (5K Run/Walk)
Anchor Tee (Golf)
"Champion of the Anchor" for Anchor Splash/Games
Cornhole tournament

NON-SIGNATURE FOUNDATION FUNDRAISERS

Non-Signature Foundation Fundraisers are small-scale fundraisers that are planned by the Foundation team and/or a small committee but require full chapter membership support. These are normally non-tax-deductible fundraisers.

Examples:
Corn for a Cause
Delta Gamburger
Deserts or Donuts with DGs
Eye Scream for Ice Cream
Milk and Cookies
Paws for a Cause
Penny Drop/Penny Wars
Puppies and Pizza/Pizza for Paws
Restaurant percentage nights
Slices for Sight

LEAD-IN FUNDRAISING EVENTS

Some chapters choose to hold lead-in fundraising events the week leading up to their Signature Foundation fundraiser. Some of the more popular lead-in events are Penny Drop/Penny Wars, restaurant percentage nights, food sales and other creative small fundraising events that require little planning and build up to the Signature Foundation fundraiser.

Multi-Purpose Programming

Consider incorporating Do Good: Service for Sight Hours activities as part of your Anchor Splash®/Games week. Educating your campus community by tabling and adding a service component for the Anchor Splash/Games participants can boost your fundraiser and help add awareness to our philanthropy by teaching others about Service for Sight and the mission of our Foundation..

Hosting a speaker from the organization to which you are directing a portion of your fundraising proceeds can help inform others about the impact of your fundraiser. Additionally, invite competition from your participants with a do good opportunity.

Multi-Purpose Programming Ideas:
- Show the Delta Gamma philanthropy video (available on Vimeo).
- Download various eye information resources and fact sheets from the National Eye Institute to create an informative display.
- Sponsor a vision screening during Anchor Splash/Games week.
- Invite a speaker from the local school for the blind or from an organization where members volunteer to educate others about blindness.
- Invite a guide dog organization to bring puppies to campus to make others aware of the process of training and placing a guide dog.
- Collect specific items to donate to the local school for the blind, a senior residential community or for care packages for the military.
- Set up a booth for collecting eyeglasses that can be donated to the local Lions Club or another group that recycles eyeglasses.
- Challenge participants to submit receipts with eligible products that can be scanned with the digital Box Tops app to provide cash for one of the participating Delta Gamma schools or your local school for the blind. *(Box Tops collection does not count toward Do Good Hours.)*
- Implement your own creative idea to involve participants in a service project to benefit a local organization or school that supports the blind community.

Additional service and fundraising ideas can be found in the monthly vp: Foundation newsletters. You may also contact collservice@deltagamma.org for additional service ideas and information.

Anchorbase Submission Process

1. Put the Signature and Non-Signature Foundation Fundraisers (including any lead-in events) on the chapter **calendar in Anchorbase** within at least a 4-week window for planning. *Note: Choose a date where there are no events, either sponsored or co-sponsored by Delta Gamma, where alcoholic beverages are available 24 hours prior to or after the fundraising event date. (See* Foundation Policies*)*

2. 4 weeks prior to your Signature or Non-Signature Fundraising Event, the **Foundation Fundraising Planning Form (FFPF)** will populate as a task on the Anchorbase Dashboard. Complete the task under Foundation > Task > Foundation Fundraising Planning Form. The FFPF needs to be completed and submitted no later than 4 weeks prior to the event via Anchorbase.

3. Your Advisory Team Chair and Regional Foundation Coordinator (RFNC) will need to review the FFPF and may ask you to make revisions before giving final approval. Please revise and resubmit via Anchorbase until both your ATC and RFNC have given final approval.
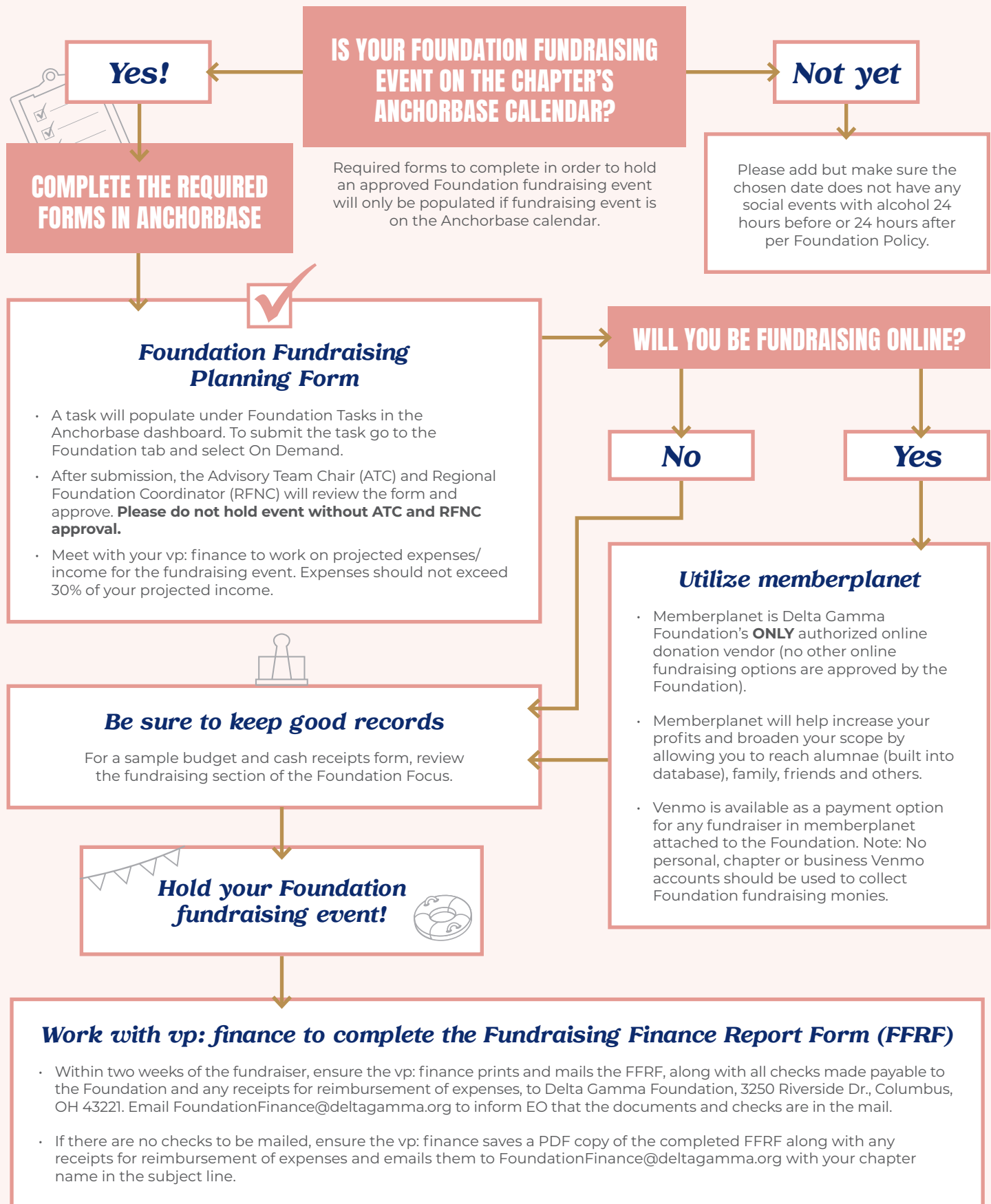
   Note: You will receive a notification if your ATC or RFNC sends the form back for revisions.

4. Within two weeks after your Signature or Non-Signature Fundraising Event, the vp: finance will need to complete and submit the **Fundraising Finance Report Form (FFRF)** with the vp: Foundation's assistance. The FFRF will populate as a task on the Anchorbase Dashboard on the day of the fundraising event. The FFRF, found in Anchorbase under Chapter Management Team > Finance > Task > Fundraising Finance Report Form, is to be completed and submitted via Anchorbase **AND** the vp: finance will need to print a hard copy and send in with any checks made payable to Delta Gamma Foundation and receipts for reimbursement of expenses to: Delta Gamma Foundation, 3250 Riverside Dr, Columbus, OH 43221. If there are no checks to be mailed in, email FoundationFinance@deltagamma.org to inform them of your submitted FFRF and include any receipts for reimbursement of expenses.

Reminder: Please do NOT wait for all donations before sending the FFRF with any proceeds at the time of submission. If donations are received after the submission date, you can send them to Delta Gamma Foundation with a note that states your Chapter Name, Name of Event, Date of Event and ask that funds are attached to the fundraiser so that your chapter receives full credit for all proceeds raised for the Foundation. Any checks written out to the Delta Gamma Foundation should be mailed to the Foundation within two weeks of receiving them. DO NOT hold onto checks for an extended period of time. ***Any check that is dated 90 days or over from when it is received by the Foundation will not be cashed, and therefore, will not be included in your chapter's fundraising total.***

Foundation Fundraising Flowchart
for Collegiate Chapters

IS YOUR FOUNDATION FUNDRAISING EVENT ON THE CHAPTER'S ANCHORBASE CALENDAR?

Required forms to complete in order to hold an approved Foundation fundraising event will only be populated if fundraising event is on the Anchorbase calendar.

Yes!

Not yet

Please add but make sure the chosen date does not have any social events with alcohol 24 hours before or 24 hours after per Foundation Policy.

COMPLETE THE REQUIRED FORMS IN ANCHORBASE

Foundation Fundraising Planning Form

- A task will populate under Foundation Tasks in the Anchorbase dashboard. To submit the task go to the Foundation tab and select On Demand.
- After submission, the Advisory Team Chair (ATC) and Regional Foundation Coordinator (RFNC) will review the form and approve. **Please do not hold event without ATC and RFNC approval.**
- Meet with your vp: finance to work on projected expenses/income for the fundraising event. Expenses should not exceed 30% of your projected income.

WILL YOU BE FUNDRAISING ONLINE?

No

Yes

Utilize memberplanet

- Memberplanet is Delta Gamma Foundation's **ONLY** authorized online donation vendor (no other online fundraising options are approved by the Foundation).
- Memberplanet will help increase your profits and broaden your scope by allowing you to reach alumnae (built into database), family, friends and others.
- Venmo is available as a payment option for any fundraiser in memberplanet attached to the Foundation. Note: No personal, chapter or business Venmo accounts should be used to collect Foundation fundraising monies.

Be sure to keep good records

For a sample budget and cash receipts form, review the fundraising section of the Foundation Focus.

Hold your Foundation fundraising event!

Work with vp: finance to complete the Fundraising Finance Report Form (FFRF)

- Within two weeks of the fundraiser, ensure the vp: finance prints and mails the FFRF, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. Email FoundationFinance@deltagamma.org to inform EO that the documents and checks are in the mail.
- If there are no checks to be mailed, ensure the vp: finance saves a PDF copy of the completed FFRF along with any receipts for reimbursement of expenses and emails them to FoundationFinance@deltagamma.org with your chapter name in the subject line.

Marketing your Foundation Fundraisers

Your philanthropic fundraising proceeds should be directed to the Delta Gamma Foundation. Up to 50% may be designated to benefit local 501(c)(3) organizations that share our Service for Sight mission. Please see the [directing your gift](#) section of the Foundation Focus or contact your [Regional Foundation Coordinator](#) (RFNC) if you have questions.

FUNDRAISING LANGUAGE

How can we advertise our fundraiser?

You **can** say:

- "Proceeds will fund the programs and services of the Delta Gamma Foundation."
- "Proceeds will fund the programs and services of the Delta Gamma Foundation and the ABC local organization." *(If directing a portion of your gift to a local 501(c)(3) that shares our Service for Sight mission.)*

You **cannot** say:

"Proceeds will support Alpha Beta chapter of Delta Gamma."

"Proceeds will support the Delta Gamma Fraternity."

When fundraising promotion/PR says:	Then:
"Proceeds will support the Delta Gamma Foundation, Service for Sight, Scholarships, Fellowships, Training and Programming." or "Proceeds will fund the programs and services of the Delta Gamma Foundation."	All proceeds MUST be directed to the Delta Gamma Foundation for processing.
"Portions of the proceeds will support the Delta Gamma Foundation." or "Portions of the proceeds will support XXXX (a local 501(c)(3) that shares our Service for Sight mission)."	All proceeds should be sent to the Delta Gamma Foundation for processing. Up to 50% should be directed to the local 501(c)(3) named in the promotion (that shares our Service for Sight mission) and the remaining proceeds directed to the Foundation.
"A Delta Gamma CHAPTER fundraising project." **Note: This option is not to be affiliated with any Delta Gamma Foundation fundraising events.**	Since NO Service for Sight or Foundation support is advertised, profit may be spent as chapter membership desires. Please consult "Considerations for Chapter Fundraising" for more information.

TRADEMARKS AND LICENSING

Delta Gamma has paired with Affinity Marketing Consultants Inc. (AMC) to protect its registered trademarks. Only licensed vendors can legally sell merchandise with Delta Gamma's marks. In turn, these vendors pay royalties to Delta Gamma.

Delta Gamma's Registered Trademarks
The name Delta Gamma, the Greek letters ΔΓ, Dee Gee, the crest, the badge, the title Anchor Splash®, and the magazine *ANCHORA* of Delta Gamma.

Anchor Splash® = Delta Gamma's official philanthropic event is two words, capitalized and always followed by ® (Ctrl Alt R in Microsoft Word.) The ® is not required after the initial use.

Licensed Vendors
Hannah's Closet is the official boutique for Delta Gammas. Overall, there are more than 600 vendors who are licensed to sell products with Delta Gamma trademarks on them. A frequently updated list of all licensed vendors is always available online.

Greek Product Logo

Be sure to look for this Official Licensed Product logo on "legal" merchandise, catalogs, vendor advertisements and websites.

FindGreek Mobile App
AMC also has a mobile app, FindGreek, which displays all Delta Gamma products that are sold by licensed vendors.

Questions? Affinity Marketing Consultants, Inc. 760-734-6764 | greeklicensing.com/contact

GAINING SUPPORT FROM SPONSORS AND DONORS

Compile a list of local businesses that may donate money (include campus businesses, corporations in your town, eye doctors, the Lions Club, alumnae, parents, etc.). Update this list every year!

- Record information about each one on the official sponsor list (see sample letters).
- Send a personalized letter or email to each business (see sample letters).
- Write a personalized thank-you note immediately after receiving any donations.
- Determine the criteria for listing the sponsors' names in the program and/or T-shirt.
- Donations are only tax deductible if the check is made out to the "Delta Gamma Foundation" and if the chapter vp: finance sends it to the Delta Gamma Foundation. Checks payable to Delta Gamma Fraternity or the chapter are not tax deductible to the donor/sponsor.
- "Sell" advertising space in the Anchor Splash program (size of ad varies with the amount donated).
- List major sponsors' names on the back of the Anchor Splash T-shirts.
- Keep accurate, up-to-date files and sponsor lists.
- Contact with businesses must be professional; be credible!
- Discount coupons for alcoholic beverages may not be included in the program. Neither should ads for "ladies night," "bar or pub crawl" or "happy hour."
- Communicate with family, alumnae, service groups, etc., as you would potential business sponsors (see sample letters in the next section of this resource).
- Share your memberplanet campaign page with family, alumnae, friends, etc.
- Solicit help from campus administrators, faculty and public officials; invite them to attend Anchor Splash.
- List donors' names, as appropriate, in the program and on social media.

NOTE: Delta Gamma Fraternity or Foundation collegiate functions may not be sponsored by distributors or producers of intoxicants (including but not limited to alcohol, tobacco, cannabis or vapes) For example: bars or smoke shops (see Foundation Policies).

On the following page are two sample letters/emails that can be adjusted and used to send to potential sponsors or donors as well as family and alumnae. Be sure to personalize the letter to meet the specifics of your event and why they should support the Delta Gamma Foundation and/or local 501(c)(3) that shares our Service for Sight mission. Be creative and have fun!

Sample Merchant Initial Letter

Dear [Name],

[Your chapter name] of Delta Gamma at [List school/university] is planning a major fundraiser to benefit our philanthropy, Service for Sight. We will be holding our [Event name] on [Date] at [Location]. [Give brief description of event]. More than 140 chapters across the United States and Canada held fundraisers last year, enabling the Delta Gamma Foundation to give grants to organizations who share our Service for Sight mission, providing access and advocacy for people living with blindness or other vision loss.

Our success depends on you and we are asking for your support! Our chapter and the Delta Gamma Foundation would appreciate a donation of any amount.

Please help [Chapter Name} chapter of Delta Gamma do good for our philanthropy, Service for Sight, which provides aid to people living with blindness or low vision. We would be proud to add your company's name to our list of donors who feel the Delta Gamma [Event Name] is a worthy cause to support.

Thank you for your consideration. I will be contacting soon to answer any questions you may have. I may be reached at [phone number or e-mail].

I hope to hear from you soon!
[Your Name]

Enclosed: Delta Gamma Anchor Splash Sponsorship Levels, Information on event, past flier

Sample Alumnae/ Family Sponsor Letter

Dear [Name],

[Your chapter name] of Delta Gamma at [school/university] is planning our major fundraiser to benefit the Delta Gamma Foundation, which supports Service for Sight, Training and Programming for members, and Individual Member Support in scholarships and grants. More than 140 chapters across the United States and Canada sponsored these competitions last year, enabling the Delta Gamma Foundation to give grants to organizations who share our Service for Sight mission. We are excited to be holding our [Event] on [Date].

Your support as a donor would be extremely beneficial for the Delta Gamma Foundation. Any donation you are able to make would be greatly appreciated and help us reach our fundraising goals to do even more good!

If you would like to support our fundraiser, please make checks payable to the Delta Gamma Foundation. Please send checks to (please mention (Event Name) in the memo section):

[vp: finance contact info] [chapter address]

You can also make a gift online on our fundraising site [link to memberplanet fundraising page]. We would really appreciate your help in making this [Event Name] our greatest event yet! Thank you for your support; I look forward to hearing from you soon!

In the Bonds, (or other closing)
[Name]

Risk Management and Your Anchor Games

DELTA GAMMA'S ALCOHOL POLICY

The objects of the Delta Gamma Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility and to develop in them the best qualities of character. (Delta Gamma Fraternity Constitution, Article II)

Delta Gamma policy states that no alcoholic beverages may be served or stored on Delta Gamma property. Pre- and post-event activities (sponsored or co-sponsored by Delta Gamma) wherein alcoholic beverages are available may take place no less than 24 hours before a fundraising event or 24 hours after the event.

DELTA GAMMA'S RELATIONSHIP TO HOST INSTITUTION

Delta Gamma Fraternity has enjoyed mutually satisfying relationships with institutions for many years. Because membership to Delta Gamma Fraternity begins at the collegiate student level, the Fraternity has sought to instill goals and foster programs that are in concert with the mission and purposes of the host institution.

These relationships have thrived because of Delta Gamma Fraternity's objects as stated in the Delta Gamma Fraternity Constitution Article II.

FUNDRAISING PRECAUTIONS

The following precautions shall be taken for all Delta Gamma Foundation fundraising events that involve the athletic performance and/or require maximum mental alertness and physical condition of participants. Examples of such Foundation fundraising events include swimming events, basketball, football, golf and tennis tournaments, bike racing, runs or walkathons, track and field events, road block intersection collections and any other fundraising activity wherein participants' well-being is endangered or athletic competition is a factor.

- A **Foundation Fundraising Planning Form (FFPF)** must be completed/submitted via Anchorbase to the Advisory Team Chair and Regional Foundation Coordinator for event approval 4 weeks prior.
- Collegiate chapters must have at least one security guard on duty at fundraising events.
- Alcoholic beverages are forbidden. See Foundation Policies.
- Any participant or spectator who consumes alcohol during the event or arrives at the event under the influence of alcohol will be disqualified and not allowed to participate in or observe the event.
- A fully equipped first-aid station with qualified attendants shall be maintained throughout the event.
- A non-Delta Gamma certified lifeguard shall be in attendance throughout all poolside or water-related events.
- There shall be no diving competition or exhibition.
- The use of dunk tanks at a Foundation fundraising event is prohibited.

- All participants (competitors, judges, coaches, timers, etc), including Delta Gamma members, whether participating in the actual event or working the event shall sign the official Fraternity medical waiver and release of liability form prior to the event. Minors who are unable to obtain the signatures of parents or legal guardians may not participate.

- Prior to the event, the chapter will contact local law enforcement and rescue organizations to advise them of the time and location of the event.

- Any event that does not maintain the respect and dignity of members and participants is prohibited.

How to Have a Profitable Foundation Fundraiser

The vp: Foundation and/or director of Anchor Splash and CMT should hold a meeting to map out projected income and expenses, then work with the vp: finance to make sure it is reflected in the chapter's budget.

- Make a simple list of all the necessary expenses. Expenses should be **less than 30%** of anticipated income.

- Set the prices for entry fees, admission, programs and project contributions to be received.

- Compare your projected income to your projected expenses (see Sample Budget). Make any necessary adjustments in order to make the profit your chapter expects. A completed budget/actuals is required to submit the Fundraising Finance Report Form.

- Work with the vp: finance on a regular basis to make sure things are on track.

- Consult the Foundation Fundraising Flowchart for Collegians.

STAYING ON BUDGET AND KEEPING TRACK OF EXPENSES

- Keep track of expenses per event by listing them on your Anchor Splash budget (see Sample Budget). Be sure all members assisting with the event keep track of receipts and indicate them in the budget.

- Every Signature and Non-Signature event should have its own budget. Lead in event expenses should be included in the budget for the Signature fundraiser.

- Record the exact amount of expenses on the budget. This is what the vp: finance will use for reimbursement and to fill out the Fundraising Finance Report Form (FFRF).

- Remember, all expenses must be within the budgeted amount.

- Tell the vp: finance to code all income and expenses to the fundraising account #332.

- Total all expenses per event after Anchor Splash/Anchor Games/Fundraising Event. Transfer the total to the Anchor Splash financial summary sheet.

Use this Sample Budget to keep track of your expenses and income.
To edit and use this form:
1. Sign in to your Google account.
2. [View the Sample Budget here](#).
3. Go to File > Make A Copy
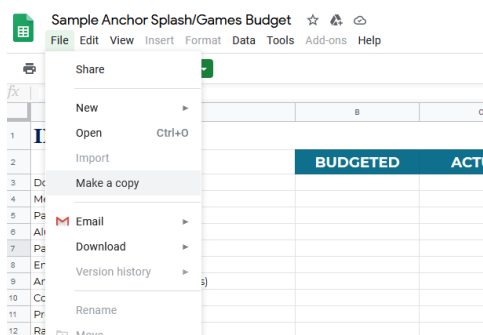
4. Rename and save the document.

FUNDRAISING EVENT TIPS

• Sell tickets ahead of time to members on campus.

• Pre-sell T-shirts before ordering to prevent excess inventory which decreases the net proceeds from your fundraiser. **Please note: The Foundation will not reimburse chapters for merchandise or apparel purchases.**

• Utilize QR redemption codes in memberplanet to pre-sell admission tickets, food sales, and any other pre-sale items. QR codes allow you to collect money for items or tickets BEFORE the event which allows for control of expenses and exchanging of cash.

• Have Service for Sight educational materials printed for tabling and other promotion.

• Work closely with your vp: finance and Regional Foundation Coordinator (RFNC).

• Assign members to crews and utilize these committees to distribute your workload responsibility (use your sisters for support!).

• Make arrangements prior to the event for tables, chairs, tents, etc.

• Set goals and work together as a CMT and JCMT to achieve them.

• Articulate to your chapter what exactly needs to be done and how they can help; use and follow an agenda for the event.

• Work with your Panhellenic community to get others involved.

• Share event info in your chapter newsletter to alumnae.

• Personally thank each donor/sponsor with a call and thank-you note.

Anchor Splash Income

- Get a receipt book and use for all cash donations, entry fees, etc. Keep copies for the files.
- Set up file folders with large envelopes to keep forms, checks and supplies in. Label them: cash receipts forms, checks to be logged and completed forms.
- Gather cash/checks as they are received. Deposit cash in chapter checking accounts and remember that any checks made out to the chapter are not tax deductible. For all checks made out to Delta Gamma Foundation, please send them to the Foundation.
- Using a cash receipts spreadsheet (see following page), fill in your name, title, committee, date and the sequential number of cash receipts forms that you are on.
  - List each receipt individually.
  - If a receipt is for more than one category, break it out accordingly across the line.
  - Make a copy of the form and checks and give it to the vp: finance. DO NOT hold on to receipts. Fill in partial cash receipts forms and give them to the vp: finance to deposit in the bank.
- After all Anchor Splash money has been received, transfer the total for each category to the Anchor Splash financial summary sheet.

Immediately upon completion of Anchor Splash/Anchor Games/Fundraising Event summarize your finances and distribute your proceeds to the Delta Gamma Foundation as voted on by the chapter.

- Collect any outstanding contributions, fees, etc.
- Pay any outstanding bills.
- Total all expense and income summary sheets. Using the Anchor Splash financial summary, enter the total income and expenses from each event. Subtract your expenses from your income to arrive at your total profit. Profit = Income – Expenses
- Record all chapter checks written from your Anchor Splash profits.
- Complete the Anchor Splash budget to determine profit.

Note: If all income and expenses are coded correctly as #332 in the chapter bookkeeping records, your monthly financial report also should show the same net profit amount.

What to do if Anchor Splash/Anchor Games/Fundraising Event money is collected and a deposit cannot be made during regular banking hours:

- Only checks can be deposited in an ATM. Do NOT deposit cash in an ATM.
- Before the scheduled event, call your local bank to find out the proper procedures for making a night deposit.
- For cash, ask if the bank has money bags that can be locked and see if the chapter can use them for making a night deposit.
- Deposit money as it is collected; record all of the deposits for your records. Deposit all cash, make copies of all checks and mail the tax-deductible checks made out to the Delta Gamma Foundation by UPS or Fed Ex to Executive Offices. Any check made out to the chapter should be deposited in the chapter account — it is NOT tax deductible.

- After deposits are recorded and you are ready to deposit the money, call campus security to escort you or another member to the bank to make the deposit.
- Ask your ATC, Foundation advisor or CFA for help in holding the money for you and getting it to the bank.
- **VERY IMPORTANT! Deposit the cash ASAP! Do not store cash in your room.** Cash should be deposited within 24 hours of receiving it.

Submitting the money to Delta Gamma Foundation for processing:
- Per chapter vote, direct the funds. Remember, ALL money raised must be distributed through the Delta Gamma Foundation. Make sure the vp: finance marks "Anchor Splash/ Games" in the memo section of the check and indicates how the gift should be directed (see following pages for more information).
- Please work with your vp: finance and remind them to mail checks (**no cash**) and a copy of the completed Fundraising Finance Report Form submitted via Anchorbase to: Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

SAMPLE CASH RECEIPTS FORM

To edit and use this form:
1. Sign in to your Google account.
2. [View the Sample Cash Receipts Form here](#).
3. Go to File > Make A Copy
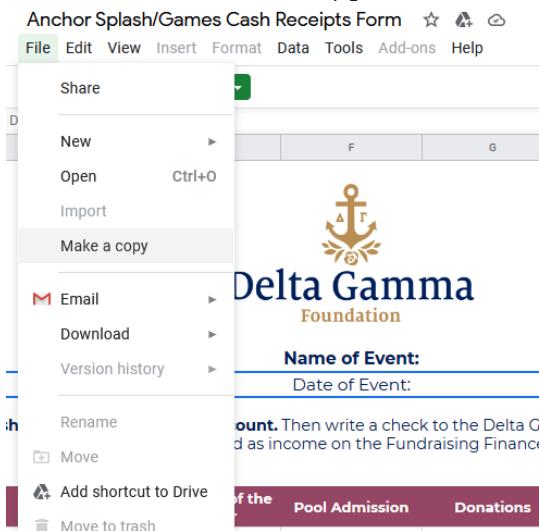
4. Rename and save the document.

⚓ Delta Gamma

Greekbill Account Codes for Fundraising

FOR VP: FINANCE AND VP: FOUNDATION
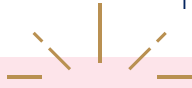
332

Account #332 - Anchor Splash/Games
To the Foundation (revolving)

All income and expenses relating to Anchor Games activities and other chapter fundraisers for DG Foundation needs to be coded to account 332-Anchor Games. **The balance in this account MUST be zero by June 30.**

330

Account #330 - Chapter Fundraising
For the chapter (income)

Includes income from non-tax-deductible fundraisers for the chapter. Special rules apply to an organization exempt under section 501(c)(7). Such an organization is designated a "social club." In general, the special rules are designed to impose a tax on income from nonmember sources. Very exact records must be kept if using this account. **This income is not tax deductible** for the donation. No more than 15% of outside income or non-member income can be generated in this account. Note: This is a non-budget account.

745

Account #745-Fund Raising
For the chapter (expense)

All expenses incurred from chapter fundraising projects that are not tax deductible and are for use by the chapter should be posted to 332. **This account is for non-fundraising activities** undertaken by the chapter such as the purchase of supplies for a puppy shower or cards for senior citizens. Expenses related to Do Good Week should also be posted here. Other non-fundraising events can include costs associated with philanthropic awareness events.

741

Account #741 - Contributions
To community & fraternities/sororities (expense)

All charitable donations made by the chapter, including the Delta Gamma Foundation or other community or fraterntiy/sorority philanthropies except Anchor Games and AnchorSplash® activities.

Questions? Please contact CollFinance@deltagamma.org.

Using memberplanet for Online Fundraising

Memberplanet is the **ONLY** approved online donation site for Delta Gamma-related fundraising. Memberplanet has donation site templates, allowing you to fundraise online and share with family and friends.

Visit the Memberplanet Donation Site Instructions in the appendix for step-by-step instructions and screenshots to set up an online donation site.

Questions on getting started with memberplanet? Contact Foundation Director: Collegiate Fundraising at fundraising@deltagamma.org or Foundation staff at FoundationFinance@deltagamma.org.

Venmo is available as a payment option in memberplanet for any fundraiser attached to the Foundation if set up correctly and with the following caveats:
- The Foundation does not have a Venmo account. Venmo is only available as a payment option through a memberplanet donation site or payment form. **No personal, chapter or business Venmo accounts may be used to collect Foundation fundraising monies.**
- The fundraiser must be attached to the Foundation within memberplanet.. If the fundraiser is not attached
- to the Foundation, then the chapter will need to create a new fundraiser that is attached to the Foundation's bank account.
- **For Donation Sites:** If setting up a donation site for your fundraiser, you do not need to contact anyone for assistance to set up Venmo. That is done when creating your site. Select the Delta Gamma Foundation option when asked who are you raising funds for on memberplanet.
- **For Payment Forms:** You will need to contact the Foundation finance team (foundationfinance@deltagamma.org) to initially set up the form. They will create a blank form attached to the Foundation bank account that you can edit. Venmo will be attached to that payment form.

Merchandise Reimbursement

The Delta Gamma Foundation will not reimburse groups for expenses such as, but not limited to, T-shirts and hats. Groups are permitted to sell merchandise for fundraising events, however the costs will not be eligible for reimbursement by the Foundation.

It is recommended that groups do not purchase merchandise upfront for their fundraising events. Instead, the Foundation strongly recommends that groups use vendors which allow customers to purchase merchandise directly from them and the groups receive a portion of the sales. Please check this list of approved vendors to see if they offer pre-sale on merchandise. If you need additional information, please email FoundationFinance@deltagamma.org.

Memberplanet Donation Site Instructions

*These instructions are for the Donation Site option and not the Payment Form option. If you need a payment form and need to utilize Venmo, you **MUST** email FoundationFinance@deltagamma.org to have the form set up. If you set up a payment form yourself, Venmo will not be a payment option.*

Logging in to memberplanet
Make sure that you can login. You should have received an email at the beginning of your term from "No-reply@memberplanet.com" titled "Claim Admin Account." The email would have gone to the email address you use to log into deltagamma.org and Anchorbase. This email was auto generated when you were set as an admin for your chapter account. If you don't have this email and cannot get logged in, reach out to FoundationFinance@ deltagamma.org or your Regional Foundation Coordinator (RFNC) to have the link resent.

DONATION SITE BASICS
Click the **Donation sites** option in the left menu bar:
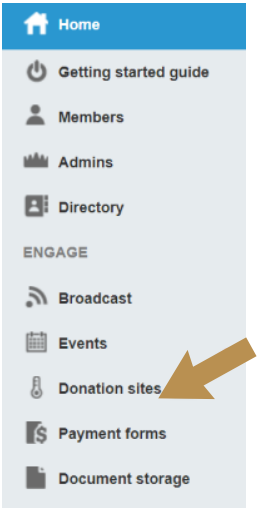
This will bring up a list of all the donation sites that have been previously created for your chapter. Here's an example of what you will see:
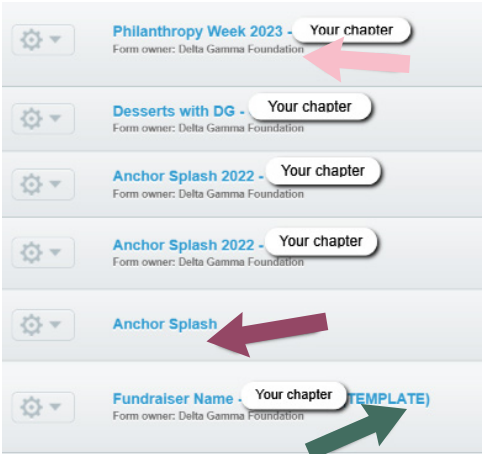
There are two important things to note as illustrated by the arrows.
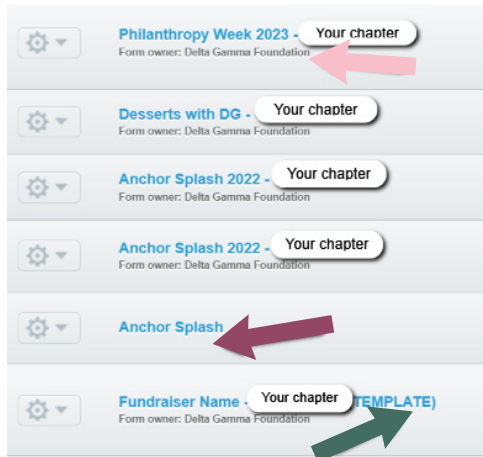
5. Always put your chapter name in the event title so your chapter gets fundraising credit with the Foundation.

6. Take note of the form owner of each event. The **pink** arrow illustrates who owns the form. If you want to have Venmo as a payment option, you must have the Delta Gamma Foundation as your form owner. You can make that happen by:

   - copying one of the existing forms with the Delta Gamma Foundation as the form owner (**pink** arrow)
   - using the template that has been set up for you (**green** arrow)
   - starting from scratch

   Use the settings icon to create the copy if you choose to copy the purple or green arrow options.

Having the Foundation as a form owner ensures that all your fundraising money goes straight to the Foundation's bank account, and it does not have to route through your chapter account. ***This is the correct way to fundraise via memberplanet.***

Note the **red** arrow. That shows that the form owner is not the Delta Gamma Foundation (thus Venmo will not be a payment option) and the chapter name is not in the title, meaning your chapter will not receive fundraising credit with the Foundation.

CREATING A DONATION SITE

To begin, hover over the **Donation sites** option on the left menu bar for pop up options. One of the options is to **Create donation site**. Clicking on that will bring up this page:

To get Venmo as a payment option, the Delta Gamma Foundation MUST be selected here. If you select your chapter, the Foundation will not be the form owner and Venmo will NOT be an option. The next page will bring up template options. You will be able to customize the template in the next steps.

DONATION SITE SET UP

- **Campaign Title**: Choose your event title (remember to include your chapter name in your title)
- **Why are you fundraising**: Customize the text that displays on your main fundraising screen. We have provided basic text that you can add to if you like.
- **Campaign Goal**: Set your chapter's fundraising goal here.
- **End date**: Choose a date that is after the end of your event in case there are last-minute donations.
- **Add videos**: This is a good place to insert a Foundation video or footage from a previous fundraiser. This gives you a chance to show why you are fundraising.
- **Default donation**: This will set the amount in the donation payment box. It can be customized to whatever makes sense for your event. Donors can also edit this amount when they make their donation.
- **Giving levels**: Often fundraisers have sponsorship levels, so you can fully customize the title and amount of your level. If you want to add levels, just click the button that says, "add a giving level." People can only choose one giving level, so if you want to sell tickets or allow multiple payments, you will want to change this to a payment option in a future step.

After you've completed this section, click **Save and continue**.

DONATION SITE CAMPAIGN PAGE SET UP

The next screen is your main campaign page where more edits can be made.

- Customize the campaign link: memberplanet will set a default link, but you can edit that link or choose the shortened URL option by clicking the "customize" button.

Campaign page link: www.memberplanet.com/campaign/deltagammafoundation/anchorgames_7   Customize

- Change your accent color changes the button colors and the button text color.

Accent color   Button text color

- Keep the section that says, "Campaign by Delta Gamma Foundation".
- Hover over the photo section to either hide or edit the header image.
- Keep the event title.
- Hover the social media icons to remove those share options from the final page by clicking "hide". Most campaigns just keep this option included.

f Share   Tweet   in Share   Share

- Hover over the event text to hide or edit the large body of text entered in the previous main setup page.
- Add photo album: This isn't typically used. Most chapters enter photos in the event text block above. If you would like to add photos to your donation site, email FoundationFinance@deltagamma.org for assistance.

> ⊕ Add photo albums
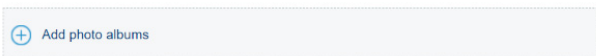
- Add videos: If you didn't add a video(s) on the previous screen, you can add those here.
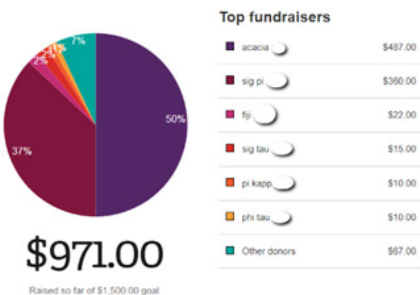
> ⊕ Add videos
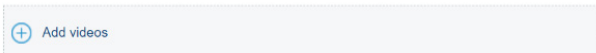
- Add fundraisers chart: This will display a pie chart that will show how much money each person has raised through their supporter pages (see how to add those below).
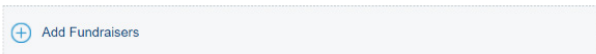
> ⊕ Add Fundraisers Chart
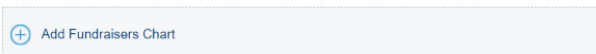
    This is what that chart will look like. This example includes the top fundraising teams, but this chapter also uses supporter pages for their chapter members.
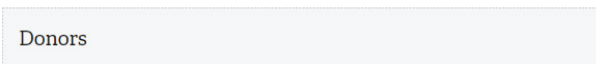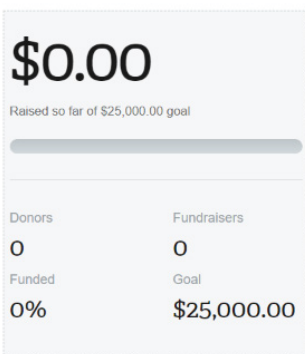

- Add fundraisers: This will list the totals for each fundraising supporter page.

> ⊕ Add Fundraisers

- Donors: This will list the names of all the donors. You can choose to hide this by hovering over the block.

> Donors

- This section will display your fundraiser progress (the amount in the image is the default). Hover to pull up the "hide" option.

- Donate button: Hover over this to change the button text. Example: "Buy Tickets" might fit better for your event.

- Support this campaign box: We highly recommend this option to increase and track who is raising funds.
    - When your main donation page is published, anyone can click the "support this campaign" button to create their own fundraising page that is linked to your main fundraiser.
    - This allows chapter members to share their own page with their family and friends.
    - It is also an option to track the teams that are participating in your fundraising event
    - As these supporter pages are created and funds are raised through those links, the fundraisers chart pie graph shown above will populate on your main page if you added that option. Teams are competitive and displaying the pie chart can play on that competitiveness and raise more money to keep a team on top.
    - When the final donor report is generated, the spreadsheet will show which supporter page was used for the donation, so you can see an itemized list there as well.

- Choose a giving level: The text in this box can be edited by hovering to bring up the edit menu.

- At this point, go ahead and click "Save and publish now". Publishing the campaign will make it available for donations, but until you send out the link, you can still make edits to the donation site.

MANAGING YOUR DONATION SITE

You should see a page that looks like this once you publish the campaign:

- **View campaign** button allows you to preview your fundraising page before sending it out.

- **Edit** button allows you to go back and make edits to the items displayed above.

- **View reports** allows you to see all the payments details including whose supporter link was used (if you chose that option).

- **Add a thank you message** allows you to customize the response message to each donor.

- **Copy or customize the campaign page URL** allows you to change the URL if you didn't do that previously.

- **Collect more information with a custom form** allows you to capture additional information in your form. For example, if you are hosting Desserts with DG and want to get an idea of how many pre-sales will require specific dietary restrictions, you could add a custom form that allows you to collect that information.

- **Customize giving levels or payment options** is used when you are selling items. You might set this up for a food sale where you have different prices for each item. Raffle sales is another option to utilize customized payment options. It is a good idea to keep an open donation option for general donations. Note: Choosing to customize the payment options will remove the giving levels, but you can add in a payment option that mimics giving levels. They won't show on the main landing page.

- **Redeem a code** is utilized for events where tickets are required or where there are presales. When this option is activated, donors will receive an email receipt that has a QR code on it that will be scanned at the event. It acts as a contactless ticketing option. Anyone can scan the QR code to "redeem" it. If the donor forgets to bring their QR code to the event, memberplanet admins can manually redeem the sale through the "view reports" menu.

You likely won't need any of the additional options listed in the top right section or most of the ones listed in the bottom section highlighted in light blue. If you do, please reach out to FoundationFinance@deltagamma.org for assistance.

VENMO

The use of a business, chapter or personal Venmo account for Foundation fundraising is strictly prohibited. This includes chapter members collecting money and then donating it to a memberplanet donation site or payment form. There are potential IRS consequences such as being audited and having to pay taxes on the money collected, along with the potential for fraud. Venmo is only allowed through a memberplanet donation site or payment form that's connected to the Foundation.

Venmo will populate as a payment option as seen below:

This will allow your donors to pay via a credit card, their bank or Venmo. If this is their first time using Venmo through memberplanet, donors will need to do a verification so that they authorize Venmo and memberplanet to connect. Once that is done, they will be linked going forward.

If you have any questions or issues with memberplanet, please reach out to your Regional Foundation Coordinator or FoundationFinance@deltagamma.org.

Chapter Philanthropy/Fundraising Videos

Some chapters are interested in making or contracting their own fundraising or philanthropy videos. While the Foundation doesn't prevent chapters from doing this, the Foundation is not able to provide funding or production support for chapter-made videos.

In addition, there are some guidelines to consider:
- Get permission from your adviser and RFNC before starting any video project.
- The video should be compatible with the values of Delta Gamma and the Foundation.
- The video content should accurately represent your fundraising and our philanthropy.
- You should follow these shared Fraternity guidelines.

If you have questions about this information or are considering a video project, please send an email to your RFNC.

Anchor Splash/Games Resources

THE HISTORY OF ANCHOR SPLASH
Anchor Splash is a Signature Foundation Fundraiser of Delta Gamma collegians where fraternities, sororities and non-Greek organizations compete in swimming events. It is one of the most recognized philanthropic fundraisers in the fraternity/sorority community today.

Begun in 1966 at Beta Tau-Miami as a way to celebrate its 25th anniversary, Anchor Splash has spread to chapters across North America. Many Delta Gamma chapters annually hold an Anchor Splash competition which includes events from synchronized swimming to relays. Campuses and local communities support these competitions annually, and on many campuses it is one of the most popular events of the school year.

Many Anchor Splash events also include a banner contest, skit competition, or other creative and friendly events that follow our Foundation Policies. Some chapters distribute sight-saving materials and hold eye screenings as well.

Along with Anchor Splash, Delta Gamma collegians hold other Anchor Games events, including Anchor Slam (basketball/volleyball), Anchor Dash (runs) and Anchor Bowl (bowling/football).

Funds from these events contribute to the Delta Gamma Foundation's three areas of support: Individual Member Support, Training and Programming, and Service for Sight. By donating the proceeds of an Anchor Splash/Games event to the Delta Gamma Foundation, you are furthering Delta Gamma's ability to do good.

CHAMPION OF THE ANCHOR

A special event to be held in conjunction with Anchor Splash or Anchor Games, this individual participant competition honors individuals based on character, personality, knowledge and support of Delta Gamma and Service for Sight. The competition should be open to all genders and no participant should be asked to compete in any activity that is strictly based on physical strength or beauty. It is critical that it be held with the most respect for human dignity, Delta Gamma values and abides by all Foundation Policies. If you do not abide by all of the above, your chapter runs the risk of having this event eliminated in the future.

Please ensure that your chapter is executing a Champion of the Anchor contest that creates a friendly, tasteful, respectful and inclusive event that will reflect positively on the contestant, the Fraternity, the Foundation and your institution.

DO:	DON'T:
Do create a Signature Foundation Fundraising Event that has a clear and meaningful purpose that enhances the image and reflects positively on the fraternity/sorority community.	Don't participate in or sponsor activities that are demeaning and have even a hint of sexism. Delta Gamma has supported and signed the National Panhellenic Conference (NPC) resolution that supports this.
Do conduct interviews that ask candidates value and character based questions that focus on their philanthropic projects, do good service activities, achievements, goals and qualities as a human of good character.	Don't require candidates to answer any interview questions that are embarrassing in nature or put the candidate in an awkward or uncomfortable position.
Do require contestants to have presentations or performances that are in good taste and reflect the high values of our Fraternity and abide by the Foundation Policies.	Don't allow any vulgar movements, gestures, or touching of judges, members, or audience members.
Do ensure that all competition criteria is equally acceptable for all participants.	Don't hold any events that are based on beauty or pageantry.
Do create a format via interviews or presentations that highlight Delta Gamma and our philanthropy, Service for Sight.	Don't require candidates (via point system or other means) to hold their **own individual** fundraising events to support or raise money on behalf of the Delta Gamma Foundation (see Foundation Policies).
Do have the judges of competitive events be non-collegians. Examples: university faculty/administrators, DG alumnae, advisers, House Directors, or parents.	Don't hold fundraising events at a venue that sells or serves alcoholic beverages. No alcohol or events with alcohol 24 hours before, during, or 24 hours after fundraising events. (See Foundation Policies)

ANNOUNCER SCRIPT FOR ANCHOR SPLASH/GAMES

Pick a chapter member to be your Announcer who is a clear, strong, confident and poised public speaker.

Hello everyone!

Welcome to (name of chapter) chapter of Delta Gamma's annual (name the Signature Foundation Fundraising Event). My name is (state your name) and I am your announcer for today.

Let me introduce our Foundation team (introduce director of Anchor Splash and the director of fundraising by name) who I would like to thank in planning this fabulous event!

Along with the judges (ask each judge to stand up and introduce themselves and what role they play).

We also have special guest here today: (Introduce any special guests ask each special guest to stand up and introduce them and where they are from).

Participating in today's event will be (Introduce the participants in today's event state individual's name or organizations that are participating).

Delta Gamma was the first Panhellenic organization in 1951 to form a foundation. The Delta Gamma Foundation's mission is to foster lifetime enrichment for members, promote Service for Sight and partner with the Fraternity to ensure the future of our sisterhood.

Our philanthropy is Service for Sight, dedicated to both the prevention of blindness and the improvement of lives affected by vision loss. Each year our Foundation is grateful to be able to give funding to organizations that share our Service for Sight mission through education, genetic research, adaptive devices, braille and audiobooks, guide dogs and many other life-changing programs. As Delta Gammas, we are grateful to be able to support the Delta Gamma Foundation and our philanthropy through this year's (event name).

Today at our (name the Delta Gamma Foundation Signature Fundraising Event) we will be holding (list out events).

We would like to thank you for attending our event today and contributing to the (name the Delta Gamma Foundation Signature Fundraising Event).

If you have a break during the event, please show a Foundation video or have your special guest speak about their organization.

SAMPLE THANK-YOU NOTES

Generic Service for Sight:

Dear [Name],

[Chapter] of Delta Gamma at [List school/university] appreciates the support your business has shown our chapter this year and your contribution of [description] for our [Event name] was very generous.

Our [Event type] raised more than [amount raised], which will go to our philanthropy, Service for Sight, which provides support to people living with blindness or other vision loss and promotes eye health and sight conservation. Your generous donation will support Service for Sight which helps fund important programs for the low-vision community.

Thank you again for your support of the [Chapter] of Delta Gamma.

Sincerely,

[Your Name]

Fundraising for the Foundation and a local 501(c)(3) sight-related organization:

Dear [Name],

[Chapter] of Delta Gamma at [List school/university] appreciates the support your business has shown our chapter this year and your contribution of [description] for our [Event name] was very generous.

Our [Event name] raised more than [amount raised], a portion of which will go to support the mission of the Delta Gamma Foundation, and to [Name of Local 501(c)(3) that shares our Service for Sight mission]. Your donation will enable Service for Sight to help fund important services to people living with blindness or other vision loss

Thank you again for your support of [Chapter] of Delta Gamma.

Sincerely,

[Your Name]

Generic Foundation mission:

Dear [Name],

[Chapter] of Delta Gamma at [List school/university] thanks you for [description of donation]. Your support for our [Event Name] is greatly appreciated.

Proceeds from our event will go to the Delta Gamma Foundation. The Foundation's mission is to foster lifetime enrichment for members, promote Service for Sight and partner with Delta Gamma Fraternity to ensure the future of our sisterhood. Your support has helped us continue our mission.

Thank you again.

Sincerely,

[Your Name]

PLANNING CHECKLIST

6-9 Months Prior:
- ☐ Determine an overall budget with vp: finance.
- ☐ Set goals with CMT (amount to be raised, participation, sponsorships, attendance).
- ☐ Set date for fundraising event (review with University, FSL/Panhellenic and chapter calendars).
- ☐ Add fundraising event to your chapter calendar in Anchorbase by the deadline. For more information on successfully completing a fundraising event in Anchorbase, click on the help tab.
- ☐ Review Alcohol Policy and chapter calendar in Anchorbase for conflicts.

3-6 Months Prior:
- ☐ Reserve facility for event and meet with facility coordinators.
- ☐ Make sure that deposit for facility is refundable in the case of unforeseen circumstances that are outside of the chapter's control.
- ☐ Finalize artwork/design for T-shirt and submit to CMT/ATC for approval.
- ☐ Compile a list of possible sponsors/alumnae.
- ☐ Reach out to possible sponsors/alumnae/family/friends.
- ☐ Confirm with all vendors (date/time/location/services needed).
- ☐ If offering T-shirts, always pre-sell (members and participants buy in advance) to avoid being left with unsold inventory that cuts into your chapter profits.

2-3 Months Prior:
- ☐ Hold chapter vote to determine the allocation of proceeds and discuss how the chapter would like to direct the gift to the Foundation.
- ☐ Use memberplanet to create a donation site for your event.
- ☐ Share memberplanet page with family, friends and alumnae.
- ☐ Create program itinerary.
- ☐ Share event on social media.
- ☐ Hire security guard and certified non-DG lifeguards.
- ☐ Utilize crews and share responsibilities.

4 Weeks Prior/Week of Event:
- ☐ Complete the Foundation Fundraising Planning Form in Anchorbase and submit for your ATC or RFNC to review 4 weeks prior to the event. If revisions are needed, please complete and resubmit until you receive RFNC approval.
- ☐ Share event on social media.
- ☐ Share memberplanet donation site on social media.
- ☐ Hang banners/signs around campus.

- ☐ Finalize program itinerary.
- ☐ Utilize crews to set up/clean up event.
- ☐ Sell ticket/register teams.
- ☐ Distribute and collect Medical Waiver and Release of Liability Forms.
- ☐ Review and finalize budget.
- ☐ Make arrangements for cash box at event.
- ☐ Create a Foundation info board for event.
- ☐ Meet with facility to sign contracts/go over details.
- ☐ Meet with security/lifeguards to discuss expectations and event details.
- ☐ Organize prizes, raffles, giveaways (if needed).
- ☐ Obtain Certificates of Insurance for venue/security (if necessary off-campus).
  Contact your Regional Foundation Coordinator or ATC with questions.
- ☐ Assign a member to be the Announcer and go over Announcer script as outlined in the handbook. Following the script will ensure a well-timed and executed event.

After the Event:
- ☐ Secure funds, process and deposit.
- ☐ Remind and help your vp: finance to complete the Fundraising Finance Report Form (FFRF) via Anchorbase. Have vp: finance send a copy of completed FFRF with proceeds (**no cash**) to Delta Gamma Foundation within 2 weeks following the event. If no checks are to be mailed in, have vp: finance email a PDF of the completed FFRF to FoundationFinance@deltagamma.org.
- ☐ Send thank you letters to donors, sponsors and participants.
- ☐ Congratulate your chapter on a job well done!

Collegiate Fundraising FAQs

Q. My chapter was unable to hold our fall fundraiser as scheduled on the Anchorbase Calendar. We want to hold an alternative fundraising event next month to make up for the canceled fundraiser. Can we do this?
A. Yes, if you follow these steps before holding:

- You will need to add the event to the master calendar on Anchorbase. Adding the event to the master calendar will generate all of the required fundraising forms through Anchorbase. Note: The Foundation Fundraising Planning Form is due 4 weeks before the event, so ensure that the date you pick is at least 4 weeks from the date you add the event to the calendar.
- Work with your vp: programming to ensure that the fundraising event does not conflict with any chapter events.
- The fundraising event date cannot have any event with alcohol 24 hours prior or 24 hours after the date of the fundraising event. (See [Foundation Policies](#))
- Holding a fundraiser without following the above procedures would be considered holding an unauthorized fundraiser, which could allow chapters to be vulnerable to liability issues.

Q. Can parents receive a tax write-off form if they donate to Anchor Splash?
A. Yes, it is possible for tax-deductible donations to come from parents or others for Anchor Splash. Their check is their receipt if the gift is under $250. If the gift is $250 or more, the Foundation will issue a receipt to the donor. However, in order to be tax-deductible there are specific procedures to follow.

- Most importantly, the checks MUST be made payable only to Delta Gamma Foundation. Checks payable to Delta Gamma Fraternity or the collegiate chapter are not eligible for a tax deduction. Chapters cannot retain a portion of the proceeds for their own purposes.
- Checks should be collected and sent to Executive Offices. Photocopies of the checks should be made for the chapter to keep for sending thank you notes to these donors.
- If donations are made online via memberplanet, those funds go directly to the Delta Gamma Foundation. Make sure the fundraiser is attached to the Foundation account on memberplanet and the donor will receive a notification verifying tax-deductibility if their gift is $250 or more.

Q. How should chapters handle cash and checks received from a fundraiser?
A. **NO CASH SHOULD BE SENT TO EO**. The chapter should deposit all cash donations into their chapter checking account and record the amount in their 332 account.

- If there is a positive balance in the 332 account, after expenses have been paid, then vp: finance needs to send a chapter check to the Foundation for the positive 332 account balance.
- If the 332 account has a negative balance AND the Foundation Fundraising Finance Report Form shows positive net income from all sources (including checks payable to the Foundation and memberplanet online donations) then the vp: finance needs to request reimbursement for their fundraising expenses from the Foundation by emailing FoundationFinance@deltagamma.org.
  - Note: a receipt is needed for all fundraising related expenses, even if the purchase was made with a chapter purchase card.

- The Foundation Fundraising Finance Report Form should be sent to the Foundation by mail or through email if no checks are being sent, whether the 332 account has a negative or positive balance.
- Donations made through memberplanet will be sent directly to the Foundation (ensure that it is attached to the DG Foundation account) and are tax-deductible to the donor.

Q. Does my chapter have to pay sales tax on items purchased for a Foundation fundraiser?
A. Yes, the Delta Gamma Foundation is an Ohio corporation and as such is only exempt from sales tax in Ohio.

Q. Approximately how long does it take for a chapter to be reimbursed for expenses from a fundraising event?
A. Once the Foundation receives the chapter's reimbursement request via email and supporting documentation (all receipts) and their fundraising proceeds – it could take up to 10 working days for them to receive their reimbursement.

If everything is received on a Monday (meaning all information from the chapter is correct upon being received by the Foundation) the Foundation may issue their reimbursement the following Wednesday. All fundraising reimbursements are sent via direct deposit to the chapter's bank account on file with EO. The chapter's Collegiate Finance Consultant is notified of the deposit and will code it in Greekbill for the chapter. The chapter vp: finance and vp: Foundation are notified when this process has been completed.

   *If the Foundation accounting manager is out of office, there will be a delay.

Q. My chapter wants to set up an online fundraising account for donations for Anchor Splash – we were thinking about using PayPal – can we do this?
A. **memberplanet** is the Delta Gamma Foundation's **ONLY** authorized online donation vendor. PayPal, GoFundMe, or other online options are not approved by the Foundation. Chapters holding Foundation fundraisers are not authorized to channel funds to a PayPal account, as doing so would void their donor's tax deduction.

Utilizing memberplanet will also ensure that your donors see on their credit card statement that the Delta Gamma Foundation made the charge. For information regarding using memberplanet, please contact FoundationFinance@deltagamma.org.

Q. If a business donates a gift certificate or gift card, can that be tax deductible?
A. If a chapter is donating 100% of their net proceeds to the Foundation the chapter may tell the business that their gift is tax deductible. Otherwise, chapters should not make any representations to donors that the donor is entitled to any type of a tax deduction.

- For "official" receipts, charities are only required to issue them if the gift is $250 or more for cash or $500 or more for goods or services. Generally, our chapters do not receive gifts that meet these thresholds.
- We encourage chapters to send a thank you for gifts received. However, because donors that receive any benefit for their gift (such as advertising) are not entitled to a 100% deduction, we recommend the chapter not use any language that says the gift is deductible, just a simple thank you.

Q. If a business gives the chapter $20 as a sponsorship fee (it would get them real estate on their T-shirt and banner), would that $20 be a tax-deductible donation?
A. No, the very basic rule on charitable donations is that if you receive something in return for your donation the value of that item must be deducted from your donation. There are some exclusions but the basic rule applies.

In this situation the business is receiving advertising in return for their "donation". However, from their perspective generally an expense is an expense so they may not care if the $20 is a donation or advertising.

Q. What is the difference between an EIN number and tax ID number?
A. They are one in the same. Some people say EIN which is Employer Identification Number, the Foundation prefers Tax ID number, but they are the same. Essentially the number is the Foundation's Social Security Number and although it is typically presented as **31-6034001,** it is nine digits just like your Social Security Number.

Q. We are planning to have a fundraiser with a local business. Before we can print the flyer, they need the W-9 form for our Foundation and a letter (with DG's letterhead) that states the chapter will be hosting a fundraiser with their company, date and will be receiving fifty percent of the company's income for the allotted time frame.
A. The chapter should contact their Regional Foundation Coordinator (RFNC) and confirm that 100% of the net proceeds from the fundraiser (including any portion of the gift directed to a local 501(c)(3) sight-related organization) will go to the Delta Gamma Foundation.

The RFNC will then provide you with a copy of the Foundation's W-9 and tax determination letter. Typically, the restaurant will send the funds directly to the Foundation, so we would like the chapter identified on the restaurant check or at least have the chapter alert the Foundation that a check is coming.

Q. Can other organizations be involved as a partner or co-sponsor in Anchor Splash/ Anchor Games?
A. Anchor Splash/Anchor Games are Delta Gamma events. The concept of having a fraternity or any other campus group/organization co-sponsor an Anchor Splash/Anchor Games event is something that the Foundation **does not approve**. Please refer to the Foundation Policies: Co-Hosting Collegiate Fundraising Events.

- We encourage our chapters to invite other groups, fraternities, other social clubs or intramural groups to participate in our fundraising events, but it's not approved by the Foundation for another group to co-sponsor a Delta Gamma Signature fundraising event. Please direct any questions to fundraising@deltagammma.org.

Q. One of our members is hoping the Delta Gamma Foundation will sponsor them for a 100-mile bike ride for Alzheimer's Research. They will be wearing a DG shirt for positive PR for Delta Gamma. Can the Foundation sponsor them?
A. The Foundation is extremely proud of all our members and their efforts to support a variety of very worthwhile charities; however, the Delta Gamma Foundation does not endorse or sponsor individual members in their fundraising efforts.

Our Foundation works closely with other philanthropic organizations that share our Service for Sight mission and accordingly we are able, through the fundraising efforts of our collegiate and alumnae groups, to make significant grants to these organizations. Our

grants allow these organizations to further their assistance to people who are blind or have low vision.

Q. Can our Canadian chapters use our online fundraising option with memberplanet?
A. Yes! If a Canadian chapter sets up a fundraiser and utilizes memberplanet the donor's gift would be collected in US dollars. The donor's credit card provider will then convert the gift to Canadian dollars. The Canadian chapter should indicate on their donation/campaign page with memberplanet that all gifts received are valued in US dollars and the Canadian dollar's equivalent will be significantly higher. Contact fundraising@deltagamma.org for questions.

Q. We just realized that we did not submit all of our receipts from our fundraiser held last semester and we are asking to be reimbursed from EO? Can we get reimbursed?
A. Executive Offices requests that all reimbursement requests pertaining to Foundation fundraising events be sent in within 5 business days of EO receiving your Fundraising Finance Report Form (FFRF). Please contact the Foundation senior chapter fundraising finance specalist at FoundationFinance@deltagamma.org.

Note: It becomes an issue when Delta Gamma Foundation receives reimbursement requests after checks directed to a local 501(c)(3) organization have already been sent.

Individual Giving

How to Give

Giving to the Delta Gamma Foundation is a personal commitment, and the Foundation has established several different opportunities to allow each member to determine how they would like to support the mission of the Foundation.

Direct Your Gift

- Loyalty Fund (area of greatest need)
- Individual Member Support
- Training and Programming
- Service for Sight

FOUNDATION FUNDS

The Foundation has hundreds of funds for our three areas of support. Examples include:

Loyalty Fund: This annual fund provides funding for areas of greatest need to all Foundation are of support: Individual Member Support, Training and Programming, and Service for Sight. Members, non-members, collegiate chapters and alumnae groups can support this fund.

Individual Member Support

Crisis Grant Fund: This fund provides financial assistance to Delta Gamma members in crisis.

Endowed Funds: Funds created by individuals, chapters or groups permanently endowing scholarships, fellowships and other Foundation programs, including our three areas of support.

Merit-Based Fellowship Fund: Donations for one-time fellowships are placed in this fund.

Merit-Based Scholarship Fund: Gifts to general scholarships and one-time scholarships are placed in this fund.

Sisters Helping Sisters: Need-Based Scholarship Fund: This fund is designated to assist collegiate members who have proven financial need or who find themselves in a sudden or unexpected financial crisis.

Training and Programming

Training and Programming Fund: This fund supports the Foundation grant to the Fraternity supporting Social Responsibility, Health and Well-Being, and Leadership, including anti-hazing, mental health initiatives, Diversity, Equity, and Inclusion training, sexual assault prevention and survivor support, The Lewis Institute, and other leadership training.

Service for Sight

Service for Sight Fund: Donations to this fund support Service for Sight grants to organizations that share our Service for Sight mission through a grant application process.

Types of Gifts

- **One-time gifts**: make a secure gift online at donate.deltagamma.org, or you may mail a check to the Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221.

- **Recurring gifts**: Have gifts automatically deducted from your debit card, credit card or bank account through our secure giving site. You choose the amount and duration of your giving and can start or stop donations at any time.

- **Matching gifts**: Double the impact of your gift if your (or your legal partner's) employer participates in a matching gift program. Contact your human resources department for more information and email the Foundation with any questions.

- **Tribute gifts**: Make a gift to any Foundation fund in honor or memory of someone special, as well as to sponsor a scholarship or fellowship. The Foundation will notify the honoree or the family of those memorialized.

- **Stocks**: Many donors may realize substantial tax advantages by transferring gifts of appreciated stock, bonds or mutual fund shares. Capital gains on the amount of appreciation are avoided, and the donor receives a tax deduction for the asset's full market value.

- **Donor Advised Funds:** Individuals with a Donor Advised Fund (DAF) can recommend a grant to the Delta Gamma Foundation. Use our DAF lookup tool on our Planned Giving website to locate your fund and recommend a grant to the Foundation.

- **Planned gifts**: Many donors discover they can make a substantial gift through planned giving, including trusts, life-income charitable gift annuities, gifts of fully paid whole life insurance policies, qualified retirement plan assets (i.e. 401(k) or IRA), and bequests. Donors may enjoy full tax benefits for such contributions, enhancing their own financial situation even as they make a lasting contribution to the Foundation. Learn more at deltagamma.myplannedgift.org.

- **Endowments**: Many donors choose to endow a scholarship, fellowship, or other area of support, including Training and Programming and Service for Sight. Please consult the resources in the Delta Gamma website library for more information on how to endow a scholarship or fellowship.

- **Blended gifts**: Combinations of outright and deferred gifts are welcome. For more information, please contact the Delta Gamma Foundation and visit our planned giving website: deltagamma.myplannedgift.org.

RECOGNITION

Recognition encompasses the ways the Foundation acknowledges and celebrates its culture of philanthropy. We foster a sense of community among donors through our donor recognition groups.

Lifetime Giving Society

Delta Gamma Foundation's Lifetime Giving Societies recognize individual members' total giving. They reflect the sum of individual gifts to all funds to the Foundation throughout a member's life. Currently there are nine cumulative giving societies:

	1873	$1,873-4,999
	Friendship	$5,000–$9,999
	Hope	$10,000–$24,999
	Sisterhood	$25,000–$49,999
	Empowerment	$50,000–$99,999
	Inspiration	$100,000–$249,999
	Leadership	$250,000–$499,999
	Champion	$500,000–$999,999
	Visionary	$1 million or more

Rose Circle Society

The Rose Circle Society recognizes members who have given a total of $1,000 or more to the Foundation during one fiscal year, July 1 - June 30. Gifts to all funds during this time qualify a member for this annual giving recognition. There are four levels within the Rose Circle Society, and each has its own insignia pin offered to members.

	Bronze	$1,000-$2,499
	Pink	$2,500-$4,999
	Blue	$5,000–$9,999
	Cream	$10,000 or more

Founders Legacy Society

The Founders Legacy Society recognizes members who are supporting and strengthening Delta Gamma Foundation's three areas of support by making planned gifts. Bequests, charitable gift annuities, charitable trusts, endowments and beneficiary designations of life insurance or retirement plan assets are simple yet impactful ways you can leave a legacy while shaping the future of Delta Gamma.

Founders Legacy Society members help ensure a strong future for the next generation of Delta Gammas.

Three recognition levels exist reflecting the value of the planned gift.

Gold	Up to $49,999
Diamond	$50,000-$99,999
Sapphire	$100,000 and above

* All bequests and beneficiary designations must state the Delta Gamma Foundation as a primary beneficiary to qualify for membership in the Founders Legacy Society.

** For recognition at the Diamond and Sapphire levels, please provide the document or portion of the document that names the Delta Gamma Foundation as a primary beneficiary of the deferred gift.

Please visit our planned giving website at https://deltagamma.myplannedgift.org/ or contact plannedgiving@deltagamma.org for more information.

GOVERNANCE

Foundation Volunteers and Staff

The Delta Gamma Foundation is governed by the **BOARD OF TRUSTEES (BOT)**. The BOT consists of six elected Trustees who serve three-year terms, and three ex-officio Trustees who serve concurrently while in the Fraternity Council positions of Fraternity President, Council Trustee: Fraternity Programming, and Fraternity Treasurer. They meet a minimum of three times annually. Elected Trustees fill the officer positions of Chair, Secretary and Treasurer. View the current Foundation Board of Trustees and Fraternity Council here.

The **GOVERNANCE COMMITTEE** is composed of five members. They present to the BOT and the Foundation Voting Membership at least one, but not limited to one, candidate for each vacancy on the Board of Trustees. View the Foundation Governance Resource here.

The **AMBASSADOR TEAM** is comprised of Delta Gamma alumnae who volunteer to further the mission of the Delta Gamma Foundation by working with donors to meet mutual philanthropic goals. An Ambassador Team volunteer may meet with and/or correspond with donors in their geographic area.

FOUNDATION DIRECTORS are appointed by the Board of Trustees. They serve as subject matter experts to the members of the Fraternity and to the public. Foundation Directors include:

- Director: Alumnae Fundraising and Service advises alumnae groups as well as regional officers on information about our philanthropy, Service for Sight, Do Good Hours, and fundraising.

- Director: Collegiate Service advises collegiate chapters as well as regional officers on information about our philanthropy Service for Sight and Do Good Hours.

- Director: Service for Sight Grants oversees national Service for Sight grants.

- Director: Lectureships in Values and Ethics serves as the primary contact for information on the Delta Gamma Lectureships in Values and Ethics and communicates with collegiate chapters, alumnae groups and campuses with established Lectureships as well as Lectureships in progress.

- Director: Scholarships and Fellowships coordinates and supervises the merit-based scholarship and graduate fellowship evaluation and selection process. They also oversee the Sisters Helping Sisters: Need-Based Scholarship processes.

- Director: Collegiate Fundraising advises collegiate chapters and advisers with information on Signature and Non-signature fundraising events

The **REGIONAL FOUNDATION COORDINATORS** are a regional resource for our collegiate chapters and alumnae groups in all Foundation-related activities including service and fundraising. They work in conjunction with our Foundation Directors, the Board of Trustees and the regional team in their region.

The **FOUNDATION PROFESSIONAL STAFF** at Executive Offices consists of:

Foundation Executive Director

Development
Senior Director of Development
Director of Development

Donor Relations
Assistant Executive Director/Director of Donor Relations
Assistant Director: Programs and Impact
Donor Relations Specialist (2)

Finance
Director of Finance
Foundation Accounting Manager
Senior Chapter Fundraising Finance Specialist
Accounting Specialist

Communications
Director of Strategic Communications
Assistant Director for Communications: Creative Strategies
Events and Executive Operations Manager
Annual Giving Manager

What's the Difference Between the Fraternity and Foundation?

Article II of the Fraternity mission statement says *"The objects of this Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility and to develop in them the best qualities of character."* To that end, the Delta Gamma Foundation was created to "provide a means by which the members of Delta Gamma Fraternity may act in concert with each other in the furtherance of exclusively charitable, scientific, literary and educational objectives."

The Delta Gamma Fraternity and its chapters are formed under section 501(c)(7) of the tax code and as such gifts to the Fraternity are not tax deductible. The Delta Gamma Foundation is formed as a "Public Charity" under section 501(c)(3) of the Internal Revenue Code. As a Public Charity the Foundation can support "charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition, and the prevention of cruelty to children or animals." Gifts to the Foundation are tax deductible in the United States as allowed by law.

The Foundation is the philanthropic extension of the Fraternity. The Foundation conducts yearly fundraising campaigns to support programs, scholarships, fellowships, special

projects and events. Gifts from individuals, alumnae groups and collegiate chapters help fund the Foundation's three areas of support: Individual Members Support, Training and Programming, and Service for Sight. Gifts to the Loyalty Fund support areas of greatest need.

The Fraternity funds most of the *ANCHORA* costs, establishing new chapters, membership records and training at Conventions and seminars.

There are a number of shared costs among the Delta Gamma entities, including technological advances and the support and maintenance of Executive Offices.

The relationship agreement between the Delta Gamma Fraternity and the Delta Gamma Foundation was created to clarify both the symbiotic and business relationship of the two organizations. As each organization serves the same membership and is directed by that membership, this agreement outlines how each entity shall support the formative goals of the other in furtherance of Delta Gamma.

In furtherance of their respective mission statements, the Fraternity and the Foundation agree to work together to leverage the strengths and limitations of each entity to enhance and grow Delta Gamma.

APPENDIX

Contact List

Delta Gamma Foundation
3250 Riverside Drive
Columbus, OH 43221

www.deltagamma.org/foundation
dgfoundation@deltagamma.org
Phone: 614-481-8164

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Director: Collegiate Service - collservice@deltagamma.org

Director: Service for Sight Grants - grants@deltagamma.org

Director: Lectureships in Values and Ethics - lectureships@deltagamma.org

Director: Scholarships and Fellowships - scholarshipfellowship@deltagamma.org

Director: Collegiate Fundraising - fundraising@deltagamma.org

Regional Foundation Coordinators (RFNCs):

    Region 1 - RFNC1@deltagamma.org

    Region 2 - RFNC2@deltagamma.org

    Region 3 - RFNC3@deltagamma.org

    Region 4 - RFNC4@deltagamma.org

    Region 5 - RFNC5@deltagamma.org

    Region 6 - RFNC6@deltagamma.org

    Region 7 - RFNC7@deltagamma.org

    Region 8 - RFNC8@deltagamma.org

Professional staff at Executive Offices - dgfoundation@deltagamma.org

To find contact information for other regional team members or advisers, go to:
Anchorbase > Roster > Reports.

Delta Gamma

1873

Disability Etiquette Guide

and other helpful information on addressing, interacting and using appropriate language with individuals who are blind or have low vision

Delta Gamma
1873

Introduction

This guide was compiled by caring Delta Gamma staff, volunteers and community partners and is meant as a resource of best practices for interacting with individuals with disabilities. Without a doubt, the words we use to refer to persons with disabilities matter. This language, however, has evolved over time, and terms that were commonly used and accepted may no longer be acceptable. It is important, therefore, to not only use appropriate language to ensure people feel included and there is no barrier to full and meaningful participation but to also raise awareness about how language has evolved over time and what language is appropriate to use today. Because language changes over time, it is important to review disability etiquette frequently.

This document contains recommendations for language you might use when talking and/or writing about disability and other subjects, especially when talking or writing about our philanthropy Service for Sight. It is important to note that the world, communication and people are ever-changing. Language is a key tool in combating ableism, and it is our hope that you always use your best judgment and serve others with your heart. If you ever have questions about how to interact with an individual with a disability, it is always best to ask the individual with whom you are interacting directly.

When interacting with someone who is blind or has low vision, be yourself, relax and speak with the person in a normal tone of voice. Do not feel afraid to approach someone who is blind, and if you have trouble determining if they need assistance, simply ask – it is the kind thing to do. People living with blindness or low vision will let you know their needs.

General Guidelines for Talking About Disability

There are many words to use and ways to refer to individuals with a disability. The following information is meant to answer some questions about what language to use and not to use.

The chart below features some ways that people with disabilities are described. This list includes "outdated language" – these are terms and phrases that should not be used. This list also includes recommended language, which should be used to describe different disabilities and individuals. People have individual preferences for how you refer to them. What is "okay" for some people may not be "okay" for others. If you don't know what to say, just ask how a person likes to be described.

Disability	Outdated Language	Recommended Language
General Disability	Handicapped or the disabled (avoid euphemisms like differently abled, disability, special, etc)	Person with a disability
No Disability	Normal, healthy	Person without a disability, typical
Blind or Visual Impairment	the blind, the visually impaired	Person who is living with blindness or low vision, person who is blind/has low vision
Deaf or Hearing Impairment	Invalid, deaf-and-dumb, deaf-mute	Deaf or hard-of-hearing, person who is deaf or hard-of-hearing
Speech/ Communication Disability	Dumb, "one who talks bad," mute	Person with a speech/ communication disability, person who communicates with alternative devices or eyes
Learning Disability	Retarded, slow, brain-damaged, "special ed," learning disabled	Person with a learning or cognitive disability, tailored education
Mental Health Disability	Hyper-sensitive, psycho, crazy, insane, wacko, nuts	Person with a psychiatric disability, person with a mental health disability
Mobility/Physical Disability	Handicapped, physically challenged, "special," deformed, cripple, wheelchair-bound, lame	Person with a mobile or physical disability, person who uses a wheelchair or mobility chair, or is a wheelchair user
Emotional Disability	Emotionally disturbed, crazy	Emotionally disabled, person with an emotional disability
Cognitive Disability	Retard, mentally retarded, "special ed," dumb,	Cognitively/developmentally disabled, person with a developmental disability
Short Stature, Little Person	Dwarf, midget	Someone of short stature, little person
Health Conditions	Victim, someone "stricken with" a disability (i.e. "someone stricken with cancer" or "an AIDS victim")	Survivor, someone "living with" a specific disability (i.e. "someone living with cancer or AIDS")

HELPFUL HINTS

When talking about places with accommodations for people with disabilities, use the term "accessible" rather than "disabled" or "handicapped." For example, refer to an "accessible" parking space rather than a "disabled" or "handicapped" parking space or an "accessible" bathroom stall rather than a "handicapped" bathroom stall.

Refer to a person's disability only when it is related to what you are talking about. For example, don't refer to people in general or generic terms such as "the girl in the wheelchair" since the wheelchair has nothing to do with the conversation you are having.

PEOPLE-FIRST LANGUAGE

A common trend and courtesy when talking about individuals with a disability is to use people-first language. The purpose of people-first language is to promote the idea that someone's disability is secondary. It is not the defining characteristic of the entire individual. To use people-first language, one would refer to the individual first, then to their disability when it is relevant and appropriate. For example, say "person with a disability" rather than "disabled person." Some people, however, refer to themselves using disability-first language. For instance, one might say, "I am a blind person." We always respect the language choices of people when we are directly quoting them.

When in doubt, use the formula below as a way to speak about the individual and their disability:

Name or Title of a Person	+	Verb	+	Assistive Device or Disability
Customer, individual, professor, student, child, applicant, etc.		Has, uses, utilizes, etc.		Wheelchair, low vision, developmental delay, etc.

Many guides on disability language and etiquette may likely emphasize using person-first language, except perhaps, when discussing certain disability cultural groups that explicitly describe themselves with disability-first language. While it is generally safe to use people-first language, there are members of certain disability groups in the United States who prefer not to use it, such as the American Deaf community and a number of Autistic people/Autistics. The basic reason behind members of these groups' dislike for the application of people-first language to themselves is that they consider their disabilities to be inseparable parts of who they are. Using people-first language, some also argue, makes the disability into something negative, which can and should be separated from the person.

As mentioned throughout this resource, if you are in doubt, please feel free to ask the person about whom you are speaking.

Working with People with a Disability:

WHEN GUIDING SOMEONE WHO IS BLIND OR WHO HAS LOW VISION:

- Offer the use of your arm (at or around the elbow), walking normally. Don't take their arm as this can be invasive. Most often an individual who is blind would rather take your arm.

- Consider the accessibility of a building when walking or navigating a space. Be mindful of the route you are guiding them through or directions you might give them when walking on their own.

- Give specific, non-visual directions. The words "here" and "there" are too general for descriptive use. Be specific and label objects that give direction and location.

- Orient an individual by using numbers on the face of the clock. Straight ahead would be 12, directly to the right would be 3, directly to the left would be 9, etc.

- Describe the layout of large rooms. A brief description of how the furniture is arranged can make it easier for that person to navigate their surroundings. Generally, an in-depth description is not needed. A description such as, "the room is set up in a classroom style" or "there is a low coffee table in front of the couch" will work.

- If you come to a door, mention how it opens (in or out, left or right).

- Indicate the direction of stairs (up or down) and if they are wide or narrow. If there is a handrail, it is often useful for individuals living with blindness or low vision to access the rail for additional guidance. Additionally, you don't need to tell the person how many stairs there are, as this can be confusing. Simply when to step up or down and use of the handrail is enough.

- When showing a person who is blind to a chair, guide them to the back of the chair. They will be able to navigate the rest.

- When dining out, offer to read the menu, including prices, if no braille menu is available.

SERVICE ANIMALS:

Some people may use a service animal to assist them with daily living. Here are some tips on interacting with an individual and their service animals:

- Don't distract, feed or pet the animal. These animals are working, and by distractin them you could be putting them in a situation that is detrimental to their owner.

- Even if the animal is at rest, be sure to ask the owner's permission to interact with the animal.

- Respect the handler's wishes. If they tell you something you should or should not do when interacting with their service animals, comply with their requests.

- Do not speak to the service animal when they are on duty. This can be distracting to the service animal, and they need to be alert to take commands from their handler. Instead, speak to the handler about any instructions or information.

- If you are guiding or walking with someone who has a service animal, walk on the opposite side of the service animal.

- Don't say the animal's name or feel like you have to introduce it. Saying its name can be distracting.

WHEN SPEAKING WITH AN INDIVIDUAL WHO IS BLIND OR WHO HAS LOW VISION:

- Identify yourself by name when initiating a conversation. You should not assume the person will recognize your voice. Just as you would identify yourself when you make a phone call, it is helpful to identify yourself when speaking to someone who is blind or who has low vision. Similarly, when with a group, it's often helpful to go around the room and have everyone state their names so the individual who knows who is in the room.

- Don't use hand signals. They may not be helpful to the person with whom you are speaking.

- Speak directly to the person. Do not speak to a family member or friend instead and ignore the person who is blind. Remember they can speak for themselves.

- Do not censor your language when speaking to individuals with disabilities. It's perfectly okay to use words like watch, look and see when talking. People living with blindness or low visual know these words are part of normal conversations.

- Feel free to talk about visual entertainment, such as sports, television and movies.

- Give verbal indication when you walk away from a conversation or leave the room. If the individual to whom you are speaking can't see you, they may not know you walked away. A quick word that you need to leave will eliminate any awkward moments.

WHEN CREATING AN EVENT OR WORKING WITH AN INDIVIDUAL WHO IS BLIND OR WHO HAS LOW VISION:

- Do not be afraid to ask questions. If you're curious about the technology a person is using or if you would want to know what they can or can't see, don't be afraid to ask. Most people would rather have you ask questions than make assumptions.

- Provide electronic copies of material you'll be handing out in hard-copy form or presenting via PowerPoint prior to a meeting. This gives staff with disabilities the opportunity to load the documents onto their computer or other device and print them in an accessible format or listen to them in auditory format. Providing copies ahead of time is a necessary component to the meeting.

- Try to avoid highly stylized typefaces. When preparing documents, avoid using stylized or graphical fonts, as these can be difficult for individuals with low vision to read. Instead, use easy-to-read, sans-serif fonts with clearly defined letters and clear spacing between the letters, such as Helvetica, Verdana or Arial.

- Add alternative text tags to graphics. If you insert a graphic or photograph into your PowerPoint presentation, Word document or web page, add alternative text tags which briefly describe the image. Depending on the software you're using, this can usually be done by right-clicking on the graphic and choosing "properties."

- Not all people who are blind or who have low vision use braille. Consider presenting information in alternative formats.

REMEMBER:

DO NOT MAKE ASSUMPTIONS - People with disabilities are the best judge of what they can or cannot do. Don't make decisions for them. Depending on the situation, it could be a violation of the Americans with Disabilities Act (ADA) to exclude people because of a presumption about their limitations. For example, if you offer assistance and the individual declines, then it is important to respect their decision as they know what is best for themselves.

RESPOND GRACIOUSLY TO REQUESTS - When people who have disabilities ask for an accommodation, it is not a complaint. It shows they feel comfortable enough to ask for what they need.

DO GOOD - When you meet someone who is living with blindness or low vision, be yourself, use common sense and do good.

References

"Disability Etiquette Guide"
https://www.diversity.pitt.edu/sites/default/files/Disability%20Etiquette%20Guide.pdf

United Spinal Association, Tips on Interacting with People With Disabilities
http://www.unitedspinal.org/pdf/DisabilityEtiquette.pdf

Syracuse University Language Guide
http://sudcc.syr.edu/resources/language-guide.html

"Nine essential tips for working with people who are blind"
http://www.perkins.org/stories/nine-essential-tips-for-working-with-people-who-are-blind

"Teaching Students with Visual Impairments"
http://www.teachingvisuallyimpaired.com/social-etiquette.html

"United Nations Disability-Inclusive Language Guidelines"
https://www.ungeneva.org/sites/default/files/2021-01/Disability-Inclusive-Language-Guidelines.pdf