



**Delta Research and Educational Foundation**  
Charitable Engagement Service Webinar  
*Question and Answer*

The following questions were discussed during both sessions of the Charitable Engagement Services webinars held September 15, 2020 and October 13, 2020. The questions have been divided into eight categories—CEM Webinar and Trainings, Collecting Donations for Donor Restricted Funds, Establishing a Donor Restricted Fund, Fund Balance Reports, Fundraising Event Application and Agreement, General Questions, Scholarship and Grant Requests, Third Party Grants. The questions and responses were edited in early 2024 for clarity.

**CEM Presentation and Webinar Trainings**

1. Will a recording of the video be made available to share with Delta chapter members?  
Yes, the video will be provided at a later date on the DREF website ([www.deltafoundation.net](http://www.deltafoundation.net)).
2. Can DREF present this webinar to chapters? Are chapters charged a fee?

No; Delta Chapters are never charged a fee for a DREF staff member to present this webinar to the chapter via Zoom. To request a DREF staff person to present this webinar to your chapter, please contact the appropriate regional liaison to schedule providing the bandwidth exists to make this possible.

Adina Walker, Southern and Southwest Regional Liaison  
[awalker@deltafoundation.net](mailto:awalker@deltafoundation.net)

Joyce Kilgore, Central, Eastern, Farwest, Midwest, South Atlantic Regional Liaison  
[jekilgore@deltafoundation.net](mailto:jekilgore@deltafoundation.net)

3. Can Delta Chapters with DREF donor restricted funds participate in Workplace Giving?

Yes. The Delta Chapter will need to fill out the *Workplace Giving form* to alert DREF of any incoming donation from a company that should be designated towards a chapter. Since the donor information can be limited depending on the policies of the company's giving program, DREF encourages contact with the regional liaison or DRF Donor Manager to follow up on any workplace giving activity designated for a chapter.

### **Establishing Donor Restricted Funds**

1. Can chapters add another scholarship fund to their donor restricted fund?

Yes. Delta Chapters would need to fill out another *Establishing a Donor Fund form* to start the scholarship fund. Delta Chapters must also be mindful when submitting *Remittance forms* to clearly state which fund the deposit should be credited.

2. Does a new donor restricted fund need to be set up for each fundraiser event?

No. A fund does not need to be set up for each fundraiser event.

### **Fund Balance Reports**

1. What is the procedure for addressing a discrepancy with a fund balance report?

The chapter would first need to contact their regional liaison with all the documentation showing their balance. The regional liaison would contact our financial team to review DREF's records and resolve any issues.

2. How are fund balance reports distributed?

Fund balance eReports are distributed via email on a quarterly basis.

### **Fundraising Event Application and Agreements**

1. Can DREF partner with chapters to apply for bingo licenses?

No; DREF does not partner with chapters for any gaming or raffle licenses. Those are not charitable nor educational endeavors.

2. Can DREF provide a tax acknowledgement letter for a venue rental?

No. When partnering with Delta Chapters, DREF does not provide tax acknowledgement letters for venue rentals. An extensive list of activities DREF does not fund is located on page 6 of the [Charitable Engagement Manual](#).

3. Is submission of the 'Fundraising Event Application and Agreement' form mandatory for DREF to engage in any fundraising event with a Delta Chapter.

Yes; the *Fundraising Event Application and Agreement* serves as the official agreement between the chapter and DREF to partner for a fundraising event. An approved application is required for each fundraiser. All DREF co-branded events must receive approval prior to the chapter advertising, selling tickets or soliciting sponsorships.

4. How does the chapter determine the approved deductible amount for a ticket for a fundraising event? How do we advertise that on our promotional materials?

The approved deductible amount is the price of the ticket minus the individual cost of Any consumables (food, beverages) as well as any entertainment for the event. Acceptable language on any promotional materials is "a portion of the proceeds are considered tax deductible to the extent allowed by law."

5. How do you collect donations from fundraising events?

Using the *Remittance form* and/or *Donation or Pledge form*, Delta Chapters may "bundle" their collected donations and mail them to the DREF lockbox in Pittsburgh, PA. DREF will then deposit the checks within a week of receipt.

6. What is the processing time for fundraising event application and agreement approvals?

DREF makes every effort to process and approve fundraising event applications and agreements within 30 business days.

7. If collaborating with another Fraternity or Sorority on an event, would we need to submit a Fundraising Event Application and Agreement form?

If the expectation is to have DREF join as a partner with the Delta Chapter for the event, the *Fundraising Event Application and Agreement form* must be completed and approved between the Delta Chapter and DREF.

### **General Questions**

1. Can other nonprofit and community organizations outside of Delta Chapters apply for grants through DREF?

DREF currently does not provide grants to other nonprofit and community organizations outside of Delta Chapters. Delta Chapters (both with donor restricted funds and without donor restricted funds) may apply for grants through our Community Empowerment Grantmaking Program.

2. When using online platforms to donate like the DREF website, is there a fee assessed?

Yes. As with almost any online payment application, there is a transactional fee assessed by the processor platform. DREF's current online banking fee for EFT and Credit Cards is 3% plus \$.75 per transaction.

3. Is there any administrative fee charged for the Charitable Engagement Service?

No; DREF does not charge any administrative fees for our Charitable Engagement Service. The fee was eliminated in 2006 during the Delta Sigma Theta Sorority, Inc. National Convention.

4. Where is the investment policy of DREF for donor restricted funds located?

Our investment policy is located on page 5 of the Charitable Engagement Manual that reads the following:

*“Effective July 1, 2015, all restricted funds, new or currently established, will not accrue interest income; nor will the fund balance increase or decrease due to investment gains/losses; and the fund will not be charged investment management expenses. This practice is consistent with industry practices of nonprofit fund management. In order to increase funds available for chapter grant requests continual donations to the restricted chapter fund are encouraged.”*

5. Is the most recent *Charitable Engagement Manual* the April 2015 edition?

Yes. However, it is currently being updated for a 2024 release. DREF will inform Delta Chapters via email and on the DREF website when the new edition of the *Charitable Engagement Manual* is available.

6. Does DREF provide training to local foundations formed to support local chapters?

No. DREF does not and cannot provide training to local Delta Chapter foundations as that is outside the scope of our purpose. Delta chapters with foundations are encouraged to contact the National Housing and Properties Committee of Delta Sigma Theta Sorority, Inc. for any guidance on how Delta Chapter foundations must be maintained.

7. Can government employees donate to chapters through the Combined Federal Campaign (CFC)?

No. Any donations made through CFC is a donation to the Delta Research & Educational Foundation. Those donations cannot be credited to individual chapters.

## **Scholarship and Grant Requests**

1. What information is required for the disbursement of scholarship requests?

All scholarship requests require the DREF 'Individual or Delta Scholarship Request' form with the following:

- Student's Name
- Student ID Number
- Address of the school and office where the scholarship funds should be routed.

Please confirm with the school before submitting the request(s) that you are supplying the correct mailing address for the Office of Student Accounts/Bursar. This information is critical to ensure the student's scholarship is processed in a timely manner.

2. Can scholarship funds go directly towards the students?

No, scholarship funds cannot be issued to the student or the school. Scholarship funds can only be issued directly to the school. This ensures DREF stays within its IRS guidelines of distributing scholarship funds specifically and directly for educational purposes only.

3. Is there any follow-up from DREF regarding scholarship check disbursements?

Due to the high volume of requests, DREF does not provide confirmation for the release of scholarship checks. Delta Chapters are encouraged to follow up with their regional liaison should there be a concern of a check not being received at the University within 10-14 business days from submission to DREF.

4. If a student's account is in excess after receiving a Delta Chapter scholarship through DREF, are they entitled to have that money refunded directly to them from the school?

The decision to authorize a student to receive a refund check for the excess amount paid from their scholarship is decided by the chapter. Should the school contact DREF inquiring if a student can receive a refund, DREF will contact the Chapter President, Treasurer, or Authorized Representative for advisement if the school should proceed with processing the excess funding in the form of a refund check to the student or if those funds should be returned to chapter's donor restricted fund.

## **Third Party Grant Applications**

1. How does DREF assist with third party grants?

DREF can serve as chapters' 501(c)3 partnering entity that can receive grant awards from various organizations. Delta chapters are asked to contact DREF no less than 60 days prior to the grant application deadline date to allow DREF enough time to review your submission and gather required documents and signatures as needed. The chapter

must also provide a detailed synopsis of how they will execute the program for the grant to jointly fill out the application.

2. Is there a dollar amount threshold for what is considered a “major third-party grant?”

No; there is no specific dollar amount. Major third-party grants are often administered through foundations based on the level paperwork required for the application.

3. Does DREF provide a listing of grant opportunities?

No. DREF does not provide a listing of grant opportunities. We encourage chapters to start with engaging local foundations and entities in their service areas to determine if there are any available grant opportunities, what .