

DELTA 
RESEARCH AND
EDUCATIONAL FOUNDATION®

CREATING POSSIBILITIES ...
IMPROVING LIVES

Charitable ENGAGEMENT MANUAL



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Introduction

DREF's *Charitable Engagement Manual* (CEM) was developed by its Charitable Engagement Management Service (CEJM) to provide information to chapters of Delta Sigma Theta Sorority, Incorporated as well as its regions (collectively and individually known as 'Delta'), donors and community-based organizations that may receive direct funding from/collaborate with our organization, a 501(c)(3) non-profit public charity certified by the U.S. Internal Revenue Service. The mission of the Delta Research and Educational Foundation (*hereafter referred to as "DREF"*) is to deliver charitable and educational programming in local communities through chapters of Delta Sigma Theta Sigma, Incorporated. The contents of this manual will explain:

- DREF's Relationship with Delta Sigma Theta Sorority, Incorporated
- DREF Charitable Engagement Management Service Policies and Procedures
- Why Delta chapters should work with DREF and what they can accomplish when working with DREF
- The information needed in order to effectively engage with DREF.

The objective of this manual is to provide information related to making donations to DREF, applying for and receiving funds, and how to work collaboratively to deliver charitable and educational programming. DREF may make changes or modifications to this manual and/or its forms, as needed.

All service requests require that a donor-restricted fund be setup at DREF by submitting an online DREF form. All of our forms can be found [here](#) on the 'Charitable Engagement' page of the DREF website. All of our forms are both download-able and fillable; therefore, there is nothing that needs to be printed. It is imperative that you visit the DREF website, <https://deltafoundation.net>, before submitting any service requests to ensure you are using the most recent versions of our forms and to familiarize yourself with the revised manual. All forms referenced in this manual will appear in the appendix of this document as well as on the DREF website. For the remainder of this document, where only the word 'Delta' is used, it shall refer to Delta Sigma Theta Sorority, Incorporated., its regions, chapters, or Grand Chapter as applicable.

Where there is a reference to processing timeframes in days, it shall mean business days; not calendar days. Please contact DREF if there is a problem meeting a submission deadline.

Contacting the DREF Charitable Engagement Service

1703 New Hampshire Avenue NW

Washington, DC 20009

T: (202) 347-1337

E: chapterengagement@deltafoundation.net

Your CEM Liaisons



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Control of Funds Transferred to DREF

One critical aspect of law and best practices required by the DREF Board of Directors is that DREF maintains ultimate control of the funds donated to the foundation. Nothing contained herein is intended to negate any donor intent that is/was based on charitable and/or educational purposes. DREF acknowledges acceptance of donor gifts and funds that align with our mission and by approving the distribution of grant funds in accordance with our mission, the donor's charitable and educational intent and following US Internal Revenue Service guidelines. DREF expects all grantees (those providing donor funds) and other service providers to understand and honor this fact, while at the same time, helping DREF provide the best stewardship to the donors who support both entities. All donors, including Delta Sigma Theta Sorority, Incorporated, must be aware and acknowledge that when they are making any gift to a fund or to DREF, it is of their own free will and that once the asset is transferred to DREF, it becomes the property of the Delta Research and Educational Foundation to be used for charitable and educational purposes as outlined by DREF. This is all subject to approved donor restrictions as are permitted by US law. Donors should understand that unless approved in writing by DREF, their requests regarding DREF's use of their contribution is a non-binding request. Donors and requesters must understand that if grants are distributed, they cannot be used to fulfill a pre-existing pledge. DREF funds are not established nor are gifts accepted until written confirmation is received from DREF.

History of Delta Research and Educational Foundation (DREF)

In 1967, Delta Sigma Theta Sorority, Incorporated established the Delta Research & Educational Foundation (hereafter referred to as "DREF") through the US Internal Revenue Service as a 501(c)(3) public charity to support scholastic achievement, charitable and educational programs, and research initiatives focused upon African American women.

Delta Sigma Theta Sorority, Inc., a 501(c)(7) organization, did this to increase charitable giving to the sorority's charitable and educational programs. However, **DREF is a separate and distinct legally chartered organization with a separate Board of Directors and staff.** While there is a close affiliation between the two organizations, DREF has its own processes and legal requirements as a 501(c)(3) organization. Donations intended for DREF must be made payable to DREF and not to Delta Sigma Theta, Sorority, Inc.

More than fifty-five years later, DREF remains strong, vibrant, and poised to meet 21st century challenges with the same unwavering spirit and dedication the sorority originally envisioned. The charge to realize social and economic equality for future generations of African American women and their families continues to be our guiding principle. "*Delta Research and Educational Foundation: 55 Years Of Black Women's Intellectualism and Philanthropy, 1967-2022*" written by TaKeia Anthony, PhD was released and made available for purchase at the 57th National Convention held in Washington, DC in July, 2025. " Contact DREF at (202) 347-1337 or info@deltafoundation.net if you are interested in purchasing a copy.

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DREF's Mission

DREF's mission is to identify and execute solutions to issues affecting African American women and their families nationally and globally through funding and support of the charitable and educational programs of Delta Sigma Theta Sorority, Inc. and collaborative organizations.

The DREF Motto

"...Creating Possibilities..... Improving Lives..."

Values-based Philanthropy

Over the years, DREF has directed its charitable and educational giving to program initiatives reflected in the founding mission. Through Delta-inspired national collaborations, local chapter initiatives or other charitable purposes aligned with the mission, each program grant addresses the values-based objective to find sustainable solutions that increase educational opportunities and create boundless possibilities for African American women and their families, now and in the future. DREF's mission is carried out through:

- Fund development (direct solicitation of donors and funders, special events, grant writing support, major gifts, matching gifts and challenges, sponsorships, in-kind donations and planned giving etc.);
- Funding charitable and educational programs of Delta Sigma Theta Sorority, Incorporated and other charitable organizations with similar missions through grantmaking and program partnerships;
- Creating and delivering programs through DREF's Center for Research on African American Women; and
- Research and public dialogue on socioeconomic policy issues.

What DREF Funds

DREF funds charitable and educational activities solely at the direction of its Board of Directors ("The Board") or those based upon board-approved donor restrictions in such fields to include, but not limited to the following areas:

- Education
- Nonpartisan civic engagement
- International Awareness
- Financial Literacy
- Health

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DREF does not fund political activity, religious proselytizing, requests from individuals, real estate purchases, starting a foundation nor any purpose that is not entirely charitable. Most recently, Delta Sigma Theta Sorority, Incorporated established a 501(c)(4) organization, [D4 Women in Action](#), whose activities are centered around social welfare and advocacy. For more information on the 501(c)(4) organization, please contact Delta Sigma Theta Sorority, Incorporated directly.

Tax Exempt Organization Reference Chart For 501(C) Organizations

Internal Revenue Code	Delta Research & Educational Foundation 501(c)(3)	DST Grand Chapter/ Local Chapters 501(c)(7)	D4 for Women 501(c)(4)
Description/Purpose	Charitable Organization	Membership Organization	Social Welfare Organization
Activities	Fund programs addressing issues in partnership with DST and D4	Develop programs to address issues in partnership with DREF and D4	Develop and fund programs addressing issues in partnership with DST and D4
Federal Tax Exemption	Yes	Yes	Yes
Source of Income	Combination of donations, grants, and fundraising	Rely on membership fees & dues as the main source of funding (must be 65% or more)	Primarily fundraise & request contributions
Social Action Advocacy	Advocate for non-partisan issues	Advocate for non-partisan issues	Can advocate for both non-partisan AND partisan issues
Tax Deductibility of Contributions	YES, contributions are tax deductible to the donor	NO	NO
Lobbying	No lobbying	No lobbying	Can lobby for 25-30% of activity time
Individual or Shareholder benefits	Can NOT benefit any individual, except as part of a charitable class. Can NOT have shareholders.	Can NOT benefit any individual, except as part of a charitable class. Can NOT have shareholders.	Can NOT benefit any individual, except as part of a charitable class. Can NOT have shareholders.

Theta Sorority, Inc.

www.deltafoundation.net

 @DREF_1967
  @DREF_1967
  facebook.com/DREFPage

Contacting DREF

The Delta Research and Educational Foundation
1703 New Hampshire Avenue, NW Washington, D.C. 20009
T: (202) 347-1337 (office) / F: (202) 347-5091
Email: chapterengagement@deltafoundation.net
URL: <https://deltafoundation.net>

To keep abreast of DREF latest news, program endeavors, and development activities, please visit the DREF website regularly and follow the Foundation on its social media platforms:

Website	https://deltafoundation.net
Facebook	https://www.facebook.com/DREFPage
Instagram	@dref_1967
Linktree	https://linktr.ee/deltafoundation
LinkedIn	https://www.linkedin.com/company/dref1967/
YouTube	@DREF_1967
X (formerly Twitter)	@x.com/DREF_1967

All questions and concerns about DREF charitable engagement policies and procedures should always be first directed to DREF's Charitable Engagement Management Service at chapterengagement@deltafoundation.net. Please see the Charitable Engagement Manual

Information not answered in the Charitable Engagement Manual can be answered by one of the two Program Associates or Director of Programs.

We Look Forward to Working with You

The DREF staff looks forward to working with you to help you achieve your goals and vision while meeting the needs and expectations of donors. Together, your important work, our donors, and DREF make a difference in the lives of the people in our global communities. DREF is committed to *creating possibilities and improving the lives of African American women and their families*. If at any time you have further questions or need clarification on how to work with DREF, please feel free to contact us at chapterengagement@deltafoundation.net.

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Establishing a Donor Restricted Fund or Scholarship Fund

NEW POLICY UPDATE: *Effective March, 2026, DREF no longer requires a minimum \$1,000.00 remittance to establish a fund.*

In order for Delta chapters and their donors to receive tax deductions for their contributions, that chapter must first establish a donor-restricted fund at DREF. All monies remitted to DREF will reside in the chapter's fund until the chapter has a need to use it. Members of Delta Sigma Theta Sorority, Incorporated, individuals and/or families interested in establishing a DREF fund are required to complete and submit a DREF [‘Establishing a Donor Restricted Fund or Scholarship’ form](#). Once the fund is established, a quarterly eReport summarizing fund balances will be distributed by email to all fund owners. Finally, it is vitally important that DREF maintains current contact information for all fund holders. Therefore, **any time there is a change in Delta chapter leadership (due to elections, resignations, etc.), the DREF ‘Fund Change Request’ form should be submitted to the Charitable Engagement Management Service.** Submission of the form will update your contact info and ensures that chapters will receive their reports.

Please note that DREF funds do **not** accrue interest income nor does the fund balance increase or decrease due to investment gains/losses. At the same time, DREF **funds are not charged any management fees.** This practice is consistent with industry practices of nonprofit fund management. The only fees are those charged are those charged by third party processing companies for online donations. In order to increase funds available for grant requests, continual donations to your chapter fund are highly encouraged. There is no minimum fund balance that must be maintained; however, your fund balance should never fall below \$0.00. Therefore, it is important that you finance team knows your current fund balance before submitting any funding requests. If the fund balance falls into a negative status, a remittance of funds to DREF should be made immediately to bring it back into a positive dollar position. To add money to your fund, please complete and submit an itemized DREF [‘Remittance’](#) form. All checks to add monies to your DREF fund should be sent to the DREF lockbox in Pittsburgh, PA; *not* to DREF's building physical address.

ALL CHECKS MUST BE MADE PAYABLE TO ‘DELTA RESEARCH & EDUCATIONAL FOUNDATION’. NO EXCEPTIONS. Monies mailed to DREF's lockbox without a completed Remittance form will be returned to you. If DREF encounters problems accepting your donor's remittances (such as NSF issues), DREF will ask you to contact the donor directly to try and resolve the issue(s)/issue a replacement check - or a money order/credit card payment. A fee reflecting the bank's NSF fee may be deducted from your chapter's fund. **The required (recommended) initial minimum remittance to establish a DREF fund of \$1,000.00 has been removed effective 2026.** When you are ready to add money to your chapter's DREF fund, complete/sign/submit the DREF [Remittance](#) form with your “bundled” donation checks and mail checks and your completed/signed form to the DREF lockbox in Pittsburgh, PA. Again, all checks must be made payable to DREF only. Checks with any payee name other than DREF listed (e.g. XYZ Chapter or chapter fund name) will be returned because DREF's banking affiliates are unable to process them. For your chapter's recordkeeping purposes, it is *highly recommended* that your finance team retain a copy of each Remittance form you send to DREF.

Not until your DREF fund has been established are you allowed to hold “DREF approved” co-branded fundraising events, distribute scholarships, etc. For all events, you must submit your fully

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completed/signed DREF “[Fundraising Event Application/Agreement](#)’ form. It – along with any collateral you’ve created along with your sponsorship package - to be reviewed by DREF for approval. **IMPORTANT: *Until your event has been officially approved by DREF, you are prohibited from advertising the event, selling tickets to it (if applicable)-as well as any soliciting donor sponsors.*** Again, your DREF co-branded sponsorship package as well as all event collateral (ex. flyers, Save-the-Date cards, etc.) must also be reviewed and approved by DREF prior to public distribution. Please contact the DREF Charitable Engagement Management Service to request support.

To summarize:

- Once your chapter’s Donor Fund has been established, you should review the DREF [‘Charitable Engagement Manual’](#) in its entirety and review **all forms** even if you have already done so. Every A request for service from DREF is always initiated by the submission of a DREF form, which are all fillable and ‘download-able” and can be found online on the DREF [website](#). It also helps to review this document again over time so that you will become completely familiar with DREF’s policies and procedures and to ensure that you will use the correct form when needed. Using the wrong form will result in delayed processing of the request or submission that you are making.
- To add money to your fund, please complete the DREF [‘Remittance’](#) form and attach all bundled checks. Mail everything to the DREF lockbox for processing.
- Each calendar quarter, your chapter will receive an eReport showing summary balances for your funds for the past calendar quarter . This report format is “static”: a high-level summarization of activity; not a ‘transactional’ report such as the monthly reports issued by banks.
- Chapters, organizations, and/or individuals are permitted to establish DREF funds that will provide charitable and educational programming in their communities. Those funds can be devoted to scholarships and/or public service programming ONLY (per US IRS guidelines).
- Read about DREF program and development endeavors in the 2023-2024 Annual Report; click [here](#). NOTE: *The 2024-2025 Annual Report is in the final stages of the editing phase prior to being posted to the DREF website.*
- For additional support and if you have questions, please contact the DREF Charitable Engagement Management Service team at chapterengagement@deltafoundation.net.

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Endowment Funds: Spending and Monitoring Policy

NOTE: The minimum entry point for a DREF endowment fund is \$100,000.00. If establishment of an endowment fund goal is your goal, you are advised to first contact DREF directly to discuss the particulars. Endowment funds accrue interest and are managed by UBS, a global financial services firm. It is expected that distributions from endowment funds will be taken from accrued interest in the fund; not the fund principal. Endowment fund reports must be requested in writing. They are not distributed on a quarterly basis unlike other DREF fund reports.

I. Purpose of Endowment Fund

This section outlines the purpose of the endowment fund, including the objectives the DREF aims to achieve with the fund, such as ensuring long-term financial sustainability, funding specific programs, and enhancing operations.

II. Spending Policy

The spending policy defines how and when funds from the endowment may be utilized. This section should specify the percentage of the fund's value that may be distributed annually and for what purposes.

1. **Annual Spending Rate:**

The organization shall distribute up to [*Indicate the percentage %*] of the endowment's average market value over the preceding [*Number*] years, calculated as of [*insert date*]. The distribution rate shall be reviewed annually and adjusted as necessary to maintain the long-term purchasing power of the endowment, subject to market conditions, organizational needs, and donor intent.

2. **Purpose of Distributions:**

Endowment distributions shall be used exclusively for the following purposes:

- Scholarships, or other uses as applicable, e.g., funding for operational costs, capital projects, etc.]
- Any distributions outside of these specified purposes must be approved by the DREF Board of Director's.

3. **Restrictions on Use of Endowment:**

The principal balance of the endowment shall be preserved in perpetuity, and only the income or earnings (subject to the spending policy) may be used for distributions. Principal can only be accessed under extraordinary circumstances with specific approval from DREF Board of Directors.

4. **Review and Adjustment of the Spending Policy:**

The spending policy shall be reviewed by the DREF Board of Directors at least annually, and

adjusted as necessary to ensure the sustainability and long-term growth of the endowment, in accordance with prevailing economic conditions and the specific needs of the organization.

III. Monitoring and Reporting

This section outlines the DREF's procedures for monitoring the endowment's performance, tracking distributions, and reporting to stakeholders.

1. Monitoring of Endowment Activity:

The investment performance of the endowment will be monitored by DREF's Finance Committee on a quarterly basis, including review of asset allocation, returns, and risk levels. The performance will be evaluated in the context of the DREF's overall financial health and objectives.

2. Investment Performance Reports:

A detailed report on the performance of the endowment shall be provided to the Board of Directors at least quarterly. The report shall include:

- Total value of the endowment fund
- Earnings and market performance
- Distributions made from the fund
- Any changes to the fund's investment strategy or policy
- Compliance with the spending policy

3. Disbursement and Distribution Reports:

The DREF Finance department shall maintain records of all distributions from the endowment, including:

- The amount of each distribution
- The recipient or purpose of each distribution
- The date of distribution

This report will be submitted to the DREF Board of Directors on a monthly basis to ensure transparency and compliance with the spending policy.

4. Audit and Compliance:

An independent audit of the endowment fund's financial activity shall be conducted annually by DREF's external auditing firm. The audit will include verification of fund balances, performance, distribution compliance, and internal controls related to endowment management.

IV. Modifications to the Spending Policy

Any modifications to the endowment spending policy must be approved by the DREF Board of Directors. Modifications may include adjustments to the spending rate, changes in the permissible uses of the fund, or any other structural changes deemed necessary to reflect the evolving needs of the organization or changes in the financial environment.

V. Effective Date and Review Schedule

This Endowment Fund Spending Policy is effective as of [insert date]. The policy shall be reviewed and updated as necessary at least once every two years or sooner if material changes to the DREF's financial position or investment environment occur.

Signatures:

[DREF Executive Director Name]
[Title]
Date: [Insert Date]

[DREF Board Chair Name]
[Title]
Date: [Insert Date]

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Reports: How Do We Know How Much \$\$ Is In Our Fund?

Every quarter, a digital summary report containing closing and current fund balances along with activity for the past quarter is distributed via email to all fund holders. If there have been any online donations to your chapter, an additional report will come in the format of a separate Excel spreadsheet. Your chapter's Finance team should take the time to review it carefully upon receipt to look for any discrepancies. TIP: Compare your copies of the dollar amounts submitted to DREF on your [Remittance forms](#) against what is on your report. . If any discrepancies are found, please contact the DREF Charitable Engagement Management Service at chapterengagement@deltafoundation.net as soon as possible to initiate the resolution process.

NOTE: DREF does not have an online portal that can be used to access DREF fund information.

If you have not received your report, one possible reason is that DREF may not have your chapter's current contact information. If your chapter has held elections recently and there has been a change to your leadership team, a completed/signed DREF '[Fund Change Request](#)' form' should be submitted to the DREF Charitable Engagement Management Service as soon as possible at chapterengagement@deltafoundation.net. The individuals that were listed on this form when the fund was setup are the only two individuals that will receive the quarterly report..... until you update your chapter's contact info by submitting a new form. _.

[How To Access The \\$\\$\\$ In Your DREF Fund](#)

All service requests made to DREF are made online by submission of a DREF form. Of course, that means that you need to know how much money you currently have in your fund before you submit a request for it. That is why it is so important that you review your quarterly fund report. You cannot request an amount that exceeds the current balance of your fund.

To request money from your DREF und, you must complete/sign and submit a DREF '[Individual or Chapter Grant Request](#)' form. In DREF world, the money you are requesting is thought of as a granting you access to the money that has been remitted to your fund; a totally different concept from what grants are usually thought of as. All DREF forms can be found under the 'Charitable Engagement' tab on the DREF [website](#). **All DREF forms are fillable and download-able**, so there is nothing that needs to be printed. Completed/signed service request forms should be emailed to DREF's Charitable Engagement Management Service to undergo a quality assurance review before being submitted for processing leading to payment. Your request must contain a budget narrative providing details on how the funds will be spent (ex. program initiative names, amount(s) requested, timeframes in which money will be spent).

Educational/Charitable Purpose of Grant:

A separate sheet for the budget narrative is acceptable.

By default, a check will be mailed; however, you have the option of receiving your funds electronically via ACH/automated clearinghouse (which is much faster and safer than USPS) if you provide your chapter's banking information along with a digital image of a voided, blank check in addition to your completed/signed form. For requested amounts of \$10,000.00 or more, it is highly recommended that you consider electronic distribution via ACH, a faster and most more secure method of transmission. In the event your chapter has already spent money for programs (ex. Back To School bookbags and supplies) and you would like to be reimbursed, In addition to submitting the DREF '[Individual or Chapter Grant Request](#)' form, you must also submit digital copies for all receipts for money spent. Your reimbursement will reflect ONLY what you have presented receipts for; nothing in excess of those amounts.

Fundraising Events

Many Delta chapters hold fundraising events to raise funds to support local programming. Examples of successful fundraising events include:

- Golf Tournaments
- Jabberwock Scholarship programs
- Health-themed conferences for the community
- Kentucky Derby-themed events
- Sneaker Balls
- Social action-themed events
- Holiday Scholarship events
- Milestone chapter anniversary events

To utilize the DREF Charitable Engagement Service for your chapter's fundraising activity/event, the DREF '[Fundraising Event Application and Agreement](#)' form must be filled out in entirety (including the budget and checklist), signed and submitted to chapterengagement@deltafoundation.net. **Please allow up to 30 days for processing and approvals.** The earlier the better. And, upon approval of your event, notification will be sent to your chapter via email. At that point, you are free to advertise/market your event, sell tickets to it – if applicable - and solicit event sponsors. NOT BEFORE. The '[Fundraising Event Application and Agreement](#)' form must be submitted for each event where charitable services are being requested. Please note that the '[Fundraising Event Application and Agreement](#)' form contains reporting requirements for all types of sponsorships. A full event budget must be included, and all promotional collateral must be co-branded with the DREF logo.

Please note the following:

- Promotional announcements and other publicity items, i.e. news releases, social media posts, flyers, Save-the-Date cards, etc. must accompany your completed application for review by DREF prior to distribution. These items should not contain images nor any mention of alcoholic, tobacco nor cannabis products.
- If the prospective donor has a separate application that needs to be submitted, it is the chapter's responsibility to complete the specific information about the program or event before sending it to DREF for review and approval.
- All written communications such as sponsorship solicitation materials should include the statement "... *This event is co-sponsored by the Delta Research and Educational Foundation in affiliation with the XYZ Chapter/Region etc., of Delta Sigma Theta Sorority, Inc*". Use DREF's mailing address and contact information. It is appropriate to also list a local chapter contact information, as well.

If guidance is needed to complete the solicitation, contact DREF. This could take an additional 3-60 calendar days in advance of the timeframes listed below. Therefore, you should submit paperwork as far in advance as possible of your proposed event date. Incomplete or poorly written applications will delay

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the ability of DREF to respond to the application in a timely fashion and may cause it to be rejected or miss the donor's deadline.

- In-kind donations only: Submit the completed donor's application (if applicable) and DREF's [*Fundraising Event Application and Agreement*](#). It is the chapter's responsibility to secure a dollar amount value of the donation from all donors. It is necessary to have a dollar amount value of the donation so that an acknowledgement letter can be sent for tax purposes.

IMPORTANT: The following is a list of frequently requested sponsorships or activities that DREF does **not** support because they are neither charitable nor educational. They fall outside of DREF's mission and donors are not entitled to a charitable contribution tax deduction.

- Raffles (considered a 'game of chance') which are not a charitable donation;
- Advertisements (the advertiser is receiving a service in exchange for promoting a business);
- Use of the DREF Tax ID # for avoiding the payment of sales taxes for venue rentals. **Chapters are financially responsible for paying all assessed sales taxes related to venue rentals.**
- Helping chapters in establishing a foundation.

Some years ago, the Grand Chapter of Delta Sigma Theta Sorority, Incorporated prohibited Delta chapters from establishing new foundations. Chapters with pre-existing foundations have been grandfathered. Therefore, one of the advantages of chapters working with DREF is that they can receive the same benefits (tax deductible donations) as if your chapter had established its own foundation.

The abovementioned list is not inclusive of all prohibited activities. If there is a question about a particular sponsorship or activity, please contact DREF in advance and we will review if your activity falls within DREF's legally bound status and mission.

How to Secure Donations for Your Events

Sponsorships

Delta chapters may affiliate with DREF to obtain sponsorships for a charitable or educational program/event in alignment with DREF's mission. This requirement was mandated by the US Internal Revenue Service when DREF applied for 501(c)(3) status in 1967. These donations qualify as tax-deductible, and per IRS guidelines (Reference: IRS Publication 1771), DREF will send a (digital) donation acknowledgement letter to donors for all donations of \$250 or more. Therefore, their email addresses must be made available. If the donation is less than \$250, you must contact DREF to request a letter. By virtue of DREF's 501(c)(3) status, sponsorships that DREF supports include, but may be limited to:

1. In-kind Donations
2. Ticket Sales
3. Auction Items
4. Overall support of programs or events
5. Retail Community Charity programs (ex. Macy's, Bloomingdales, KateSpade™ or restaurants).

If a particular type of sponsorship you are seeking is not listed above, please contact DREF for guidance.

Potential sponsors often ask for proof of nonprofit status. As a 501(c)(3) organization, DREF can help chapters with that. **DREF does not have/use a tax deduction letter.** Once your event is approved, DREF can provide an IRS W-9 form directly to the donor. The IRS W-9 form is not for individual donor. It is a legal document for vendors and business owners. It is the chapter's responsibility to request all W-9s in writing by submitting the request(s) to chapterengagement@deltafoundation.net. Your request must include the following information:

- Donor/business name, mailing address
- Name of point of contact at donor/business name and his/her telephone number and email address.

The W-9 form will be sent directly to the donor; not to the chapter. It is the chapter's responsibility to provide full donor contact info to DREF so that that proof of 501(c)(3) status can be provided. For reference, the W-9 is an US Internal Revenue Service form that contains the EIN. [This](#) is what the form looks like.

In-kind Donations

Applications for In-kind donations must be received at least 10 business days before the application is due to the donor; not 10 business days before the items are needed. Please refer to page 4 of the *'Fundraising*

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Application/Agreement' form. If the donation request is approved by the donor, it is your chapter's responsibility to:

- Provide an invoice to the donor. **DREF does not create invoices for chapters.**
- Inform DREF of the receipt of gifts and how to obtain them.

BONUS: Customized fundraising links

Upon request, DREF Donor Management can create a customized donation link (and/or QR code) for your upcoming fundraising event(s). DREF acknowledges that many donors now would prefer to not write checks. Use of a donation link/QR code will allow donors to make online donations and also allows YOUR chapter to closely monitor how much has been collected to support that particular event. **Links are not created automatically when your event is approved; you must request one.** A link that has already been created is for one distinct event; it cannot be used for new events. If you need a new link, please send your request including the particulars (event name, date, 3 dollar amounts, your chapter logo). When a donation link/QR code has been created, a donation report can then be generated and distributed at mutually agreed time intervals. Please contact chapterengagement@deltafoundation.net for details. To request a customized donation, send your chapter – or event – logo in an email request with the following information:

- Event name
- Three donation dollar amounts
- Logo for your chapter (or event); and
- Preferred time interval for report

This is a sample of what a donation report looks like. You can request to receive it on a monthly or weekly basis.

2/17/2024 8:33	Eric Young	3232 E Forestview Trl	Crete	IL	60417	eric71@gmail.com	\$50.00
2/17/2024 9:33	LaTrisha (Devin,Terry,Arve	2724 Bear Paw Dr	Portage	IN	46368	latrishambuckingham@yahoo.com	\$150.00
2/17/2024 11:58	Marie Peralta	4360 Countryside Glen Ct	North Las Vegas	NV	89084	sweeties73@yahoo.com	\$100.00
2/17/2024 13:59	Felicia Farmer	622 E 54th Pl	Merrillville	IN	46410	fgfrn@me.com	\$5.00
2/17/2024 15:11	Michele Brookshire	615 E 54th St	Merrillville	IN	46410	gwennymor505@yahoo.com	\$25.00
2/17/2024 15:18	Chastity Billups	865 Saint Andrews Way	Frankfort	IL	60423	chastityb18@gmail.com	\$350.00
2/17/2024 16:32	Joyce Ball	2010 E 166th St	South Holland	IL	60473	joycekb613@yahoo.com	\$200.00
2/17/2024 19:27	Kimberlee McLaurin	1719 Westfield Ct	Griffith	IN	46319	kmclaurin@ivykaneproperties.com	\$25.00
2/18/2024 21:19	TONI DRISDELL	1021 N Mason Ave	Chicago	IL	60651	tonyaiad1@gmail.com	\$50.00
2/23/2024 15:06	Shavon DeBellotte	781 Fatima Ln	Hobart	IN	46342	debellotte@gmail.com	\$25.00
2/23/2024 18:12	Edvige Kpekpe	1020 n harlem	Riverforest	IL	60305	Edvigekekpe@aol.com	\$25.00
2/28/2024 20:10	Paul Stanish	11356, Morton Ct	Crown Point	IN	46307	pjstanish1@gmail.com	\$1,000.00
						GRAND TOTAL	\$8,200.00

NOTE: Donation reports cannot be generated unless a customized donation link/QR code has been provided to you.

Event Ticket Sales

Your DREF '[Fundraising Event Application and Agreement](#)' form should be submitted to the DREF Charitable Engagement Service no less than 30 days before you plan to put tickets on sale/before tickets and other promotional materials are to be printed. **EARLIER IS BETTER**. Submitting the form months in advance of a planned event is not too early. In fact, it's a very good idea.

- DREF will make every attempt to respond within (30) business days if your event application is approved or if additional information is required.
- Please submit a completed/signed DREF '[Remittance](#)' form with 'bundled' checks from ticket sales/contributions. Money should be sent to DREF's lockbox; never to the building address. **Checks must be made payable to DREF only. This cannot be emphasized enough.** Checks with other payees listed (e.g. XYZ Chapter) will be returned because they are unacceptable for DREF banking transactions.
- DREF cannot process checks received directly from individuals unless we are notified in advance to expect a donor check for a particular amount from a particular donor. Overall, donations from individuals to support chapter fundraising events/activities must be remitted directly by the chapter to DREF's lockbox. Checks should always be submitted by the chapter holding the event.
- Again, do not begin to promote your event, sell tickets, print any materials for the event nor solicit sponsors until your event application is approved; thus, the need for you to start this process as early as possible.

Auction Items

DREF's '[Fundraising Event Application and Agreement](#)' form as early as possible or at least 30 business days before the donor's application is due or when auction items need to be received or collateral material needs to be printed, whichever is earliest.

- If approved, DREF will provide the donor with its Federal Employer Identification Number (FEIN) via an IRS W-9 form and/or submit an IRS Determination Letter of Determination (only by written request) or any other required documents if needed.
- **DREF does not create invoices for chapters.**
- Delta chapters must inform DREF when items are received. Once notification is received, DREF will send the donor an acknowledgement letter. Again, the chapter must secure a dollar value for the donation from the donor.
- DREF will not send acknowledgement letters to the winner(s) of auction items, even if they pay more than the established fair market value. The donor is receiving goods or services; thus, the donation is not considered to be 'charitable'.

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Multi-Fundraising Requests (an event contains more than one type of sponsorship, e.g. tickets, in-kind and auctions in one event)

- If the request contains multiple types of sponsorships, please submit all the materials in accordance with the sponsorship requiring the greatest amount of time to process.

General Support only

- Submit DREF's [Fundraising Event Application and Agreement](#) form to DREF as early as possible (no less than 30 business days) before the scheduled event date.
- If the prospective donor requires any additional information, DREF must receive the request at least 30 business days before it is due to the donor for review and approval.

Distribution Of Scholarship Funds

When your chapter is ready to distribute scholarships, your chapter must develop its own scholarship program, including applications and selection criteria.

NOTE: Per guidelines of the US Internal Revenue Service, scholarship money can be distributed for “SCHOLARSHIP” purposes and by DREF only. **NO EXCEPTIONS**. Changing the purpose to ‘scholarship’ removes the limitation of funds being used only for tuition; now it can be used for tuition, housing and books. All checks are made payable to the school “in care of” the student; never sent directly to the student. Some schools may require the student to come to the Bursar’s Office to sign the check once they receive it. Once your chapter selects its recipients, a fully completed/signed DREF ‘[Individual or Delta Scholarship Request](#)’ form should be submitted to chapterengagement@deltafoundation.net. for each scholarship recipient. The requesting chapter must also submit with the form:

- A confirmation of the enrollment for each student recipient must be submitted with the request form. A current transcript is acceptable. In the case of incoming freshmen, the school can provide a letter confirming current enrollment. If the school does not provide proof of the student’s enrollment, it can be ordered from the [National Student Clearinghouse](#). **Scholarship requests received without proof of enrollment will not be processed**. A billing statement is not considered to be a confirmation of current enrollment
- The student’s ID number must be on the form. That is what the school will use to match the money with the correct student; and
- The **correct** mailing address for the school’s Bursar/Office of Student Accounts must be on the form. Please contact the school directly – or consult their website to determine the location of the office that processes tuition payments before you submit the form(s) to confirm you are supplying the correct delivery address. An incorrect mailing address will delay delivery of scholarship money to students because the check will be delivered to the wrong office. Ultimately, this can cause the student’s enrollment to be ‘flagged’ which may result in the student not being able to register for the next semester/quarter due to overdue bills. **DO NOT USE THE INSTITUTION’S GENERIC STREET ADDRESS AS SHOWN ON ITS WEBSITE**. In addition, if it has been reported that a scholarship check has not reached the school – in most cases due to a bad mailing address - and the chapter requests a “stop” payment and check reissuance, your chapter’s DREF fund could be debited for the \$50.00 “stop payment” bank fee.
- An employee’s name, phone number and/or the email address of the office that processes payments should be given in Section II. Scholarship Request of the form. This information will help DREF Charitable Engagement team members to better troubleshoot and advocate for you/the student when a student has reported that he/she has not received their scholarship.
- **Effective immediately, the ‘Educational/Charitable Purpose of Scholarship’ is ‘Scholarship’; it is no longer “Tuition”**. This change recognizes the additional and non-optional costs (ex. housing, books, etc.) that must be paid. Therefore, ‘**Scholarship**’ is the only appropriate response on the scholarship request form.
- **Scholarship requests should never be sent to the DREF lockbox**; they should always be submitted via email to DREF at chapterengagement@deltafoundation.net. The DREF lockbox is a financial security protocol that was implemented in 2021 and should be used to remit money ONLY.
- **IMPORTANT: Scholarship requests that have already been submitted should NEVER BE RESUBMITTED. For any reason.** If you are questioning whether or not a request has been

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processed, contact DREF first. **Do not resubmit the same scholarship request.** It will be processed as usual, but that means that the amount of that scholarship request will be deducted – a second time - from your fund. Once that money has been requested/sent to the school, there is no guarantee that DREF will be able to recoup it from the school. .

- Just as a reminder: Again, per the guidelines set forth by the US Internal Revenue Service, only DREF can directly distribute scholarships using the money in your chapter’s DREF fund; not chapters. And, by default, all scholarship checks are mailed to the educational institution; never to students. However, in the cases where expediency demands it, scholarship money can be sent electronically via ACH providing the chapter provides the school’s ACH information on page 2 of the form. Electronic transmission of funds via ACH is recommended for amounts of \$10,000.00 or more.

Requesting Scholarship Funds

To request that monies be disbursed from your DREF fund to be sent to an educational institution as a scholarship:

- Complete the DREF *‘Individual or Delta Scholarship Request’ form* for **each** student recipient
- Attach a confirmation of enrollment (ex. current class schedule). **NOTE: A bill from the school does not confirm that the student is currently enrolled.**
- Submit your request(s) to DREF at least 30 business days in advance of the start of the semester
- to ensure the funds will arrive ‘on time’ and no late penalties will be charged.

Your form must have an authorizing signature. An academic institution must be one of the payees on the form; checks will not be written to the student nor to their parents. If you opt for electronic transmission of scholarship monies via ACH, it is the DREF fund holder’s responsibility to secure the ACH info as well as the accuracy of the mailing address of the school’s Bursar’s Office/Office of Student Accounts for all mailed checks.

III. Certification

I acknowledge that this is a non-binding request and that The Delta Foundation’s Board of Directors makes all grant/scholarship decisions in its sole discretion, subject to approved donor restrictions and applicable law. I certify that if this grant/scholarship is distributed, it will not fulfill a pre-existing pledge to the recommended program, institution or student, and neither I, nor any other individual, will receive any goods, services or other private benefit from the organization. I understand that grant/scholarship requests from chapters of Delta Sigma Theta Sorority, Inc. and individual donors are given earnest consideration when the Foundation is looking to fund projects. Approved grants from The Delta Foundation are accompanied by a Grant Agreement with the grantee, which includes the requester’s name or reporting requirements. I have read and agree to abide by the Foundation’s policies and procedures as described in the Foundation’s *Charitable Engagement Manual*, available at <http://www.deltafoundation.net>.

x

Signature of Requester

ENHANCED PROGRAMMING. DREF now distributes scholarship funds directly to established 529 state education funds. For information, contact the DREF Charitable Engagement Service. Please note that a three-way telephone conversation must be setup between the 529 account owner/parent of student, DREF, and the 529 Fund will have to be scheduled to facilitate this. That is because 529 plan representatives are not authorized to discuss any info regarding the individual plan with DREF; .DREF is not the account owner. It is recommended that chapters opt for these funds to be sent via ACH; therefore, that information must be supplied by the chapter on page 2 of the DREF '[Individual or Delta Chapter Scholarship Request](#)' form.

Electronic Funds Transfer (EFT) Enrollment

PLEASE INCLUDE A CONFIRMATION OF ACCOUNT INFORMATION ON BANK LETTERHEAD OR A VOIDED CHECK.

The documentation submitted should contain the name on the account, routing number, account number and type. If submitting bank letterhead, the bank officer's name and signature is also required. This information will be used to verify your account number. NOTE: Starter checks are not acceptable for EFT confirmations.

New EFT Enrollment Change to Current EFT Enrollment (e.g. account or bank changes) Cancel EFT Enrollment

PART I: BANK ACCOUNT HOLDER INFORMATION (PLEASE PRINT)

College or University Name on Account

Address of Account Holder

PART II: BANK INFORMATION

Bank Name

Bank Address

Bank Telephone Number

Routing Number (must be 9 digits) Account Number (include all zeros)

Type of Account (check one) Checking Account Savings Account

PART III: AUTHORIZING SIGNATURE

I confirm that my signature below indicates that I am authorized to request that EFT payments to be sent to the bank account indicated above.

PRINT NAME TITLE

SIGNATURE DATE SIGNED

Remitting Funds To DREF

When remitting funds to your chapter's DREF fund, all monies must be documented on a fully completed and signed DREF '[Remittance](#)' form. The donor's email address is needed so that they can receive a (digital) donation acknowledgment letter that can be used when they file taxes. **Donations that are not accompanied by the DREF 'Remittance' form will be returned to the chapter. NO EXCEPTIONS.** The Remittance form and accompanying checks must be mailed to the DREF'S lockbox in Pittsburgh, PA. **Money should never be mailed to the DREF's physical building in Washington, DC.** This is a security measure DREF instituted in the early days of the pandemic, 2021 . Your 'Remittance' form along with "bundled" donation checks should always be sent to one of these addresses:

Money sent from chapters and other fund holders to DREF should ALWAYS be sent to the DREF lockbox (located in Pittsburgh, PA) accompanied by a completed/signed DREF '[Remittance](#)' form; never to DREF's physical building address. The lockbox is a secure financial instrument that sends your checks directly to DREF's banking partner to be processed.

Why you should be using the DREF lockbox. It has several benefits:

- **The lockbox is a financial vehicle that offers enhanced security features. It reduces the incidences of stolen and misdelivered checks. Yes; that does still happen...thieves and scammers are busy.**
- **Again, chapters should never mail money to the DREF building. The lockbox is directly connected to DREF's banking partner. So, what you mail to the lockbox goes directly to the bank to be processed. Ultimately, the bank provides DREF with digital images of what you've sent. These files are managed by DREF Donor Management who works in tandem with DREF Finance to ensure accurate and timely processing and posting.**

Not only is DREF lockbox usage the most secure method to send money to DREF, but it also helps avoid your remittances/checks being deposited/cashed by DST HQ (NOTE: *Mail for both DST NHQ and DREF is delivered to the same building entrance door. We have had instances when this happened. It did not come to our attention until a chapter noted that their remittances were not shown on their eReport. Once the sender provided a copy of the front/back of the processed check to DREF, we were able to confirm who deposited the check...and that DREF never received the check(s).Therefore, DREF was put in an uncomfortable, time-consuming position of having to request a reimbursement of your money from DST NHQ's Finance Department.* Something we would like to avoid as much as possible. **SEND MONEY AND REMITTANCE FORMS ONLY. NOTHING ELSE. NO SCHOLARSHIP REQUESTS. NO GRANT REQUESTS. NO FUND CHANGE REQUEST FORMS. MONEY AND REMITTANCE FORMS ONLY, PLEASE AND thank you.** for your adherence to this policy. .

Regular Mail

Delta Research and Educational Foundation
P.O. Box 640898
Pittsburgh, PA 15264-0898

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Overnight Mail

PNC Bank
c/o DREF Lockbox Number 640898
500 1st Avenue
Pittsburgh, PA 1521

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External (Third Party) Grants

Custom external grants (also referred to as “*third party*” grants) are those offered by any party other than DREF. Grants come in different flavors: capacity building, startup/seed money, operating fund, research, endowment, facilities & equipment, technical assistance and in-kind. In some cases, a donor may request or refer Delta chapters to grantor organizations. Because donors frequently work with local organizations to support community programs, they require that the grantees be a 501(c)(3) organization. In these cases, By virtue of your status as a current DREF fund holder, DREF will act as the 501C3 partner to help Delta chapters apply to be the grantee. Please note that **DREF does not write grants for chapters, but will provide the necessary technical review assistance and oversight.** Therefore, it is important that the chapter identifies its members with prior grant writing and grant management experience. Based on the funder’s requirements, DREF may enter into a grant agreement or [Service Provider Agreement](#) with Delta chapters or other entities to implement the program.

DREF will act as the grantor for all grants and service contracts distributed by DREF. Even if a grantee is in direct contact with other donors who funded the grant or sponsorship, chapters should copy (cc:) DREF on any reports or written materials sent directly to them (particularly, award letters), so that DREF can stay up-to-date. Also, while some donors may ask for proposals or for other forms to be completed, please understand that DREF’s processes and applications must also be completed. Again, **DREF does not write grants;** that is the chapter’s responsibility. However, DREF will provide technical review assistance for your grant submission to increase the odds of a positive outcome.

There are three (3) very important issues that chapters must consider when thinking about applying for grants:

1. Assembling your chapter grant team. Decide which members will be responsible for which parts of the grant.
 - Conduct your research. Find out which grantor organizations map best to your chapter’s needs (*Who is giving money for the same type of programming you want to support in your geographic area*). NOTE: The Foundation Directory (<https://bit.ly/41q87Kp>) is a recognized subscription-based source for grant research. Also, [UrbanAwarenessUSA](#) offers tools and resources for nonprofits – including webinars and grant announcements.
 - Find out what their grant application process is. Review their website. Do they have an open application window process? Do they accept non-solicited LOIs (letters of intent)? What dollar amounts have they typically awarded? NOTE: You want your award dollar amount request to be in an acceptable ‘ballpark’ range to increase the likelihood for a successful application.
 - Does your chapter have an “inside person” at the grantor organization? Sometimes, someone from the organization will contact a chapter member to inform them that there are grant funds available. Having an inside ally is an important step to success: someone already known to you that can provide additional information to you (such as alerting you as to when there is award money currently available that you can “easily” apply for).
 - When is the organization’s application submission window?

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- Review the application process carefully. Do not skip any steps of the application process. Most online application portals will not allow you to proceed if you have skipped a step/did not respond to a required data field.
2. You must submit a Letter of Intent (LOI) to DREF for review. **ALL CHAPTERS THAT INTEND TO APPLY FOR GRANTS MUST FIRST SUBMIT A LOI TO DREF.** Decide which members will be responsible for which parts of the grant application process. **Remember: DREF does not write grants.**
 3. Meet with DREF (to share your application plans and concerns, timeframes, garner support and get any questions answered before you submit the LOI and/or proposal – if requested - to the grantor organization).
 - A. Select a date to submit your LOI to the grantor organization as per their requirements.
 - B. Once submitted, watch your mail and always respond immediately to any communications received from the grantor organization. Some grantors may request that you submit a full-blown proposal.

A donor has many choices on where to give their charitable funds, and if your chapter is submitting a proposal for a donor’s review on a program concept, both Delta and DREF want it to be in the strongest proposal position possible. Accordingly, DREF’s custom grants process requires the following steps to be followed:

- A. Submit your Letter of Intent (LOI) to DREF: Your LOI should detail your grant application plans. DREF will review the LOI for appropriateness (For example:
 - a. *(HOW MUCH ARE YOU REQUESTING? IS THE AMOUNT OF YOUR ASK REALISTIC?)*
 - b. *ARE YOU LOCATED IN A GEOGRAPHIC AREA WHERE THE GRANTOR IS LOOKING FOR APPLICANTS?*
 - c. *DOES THIS GRANTOR GIVE FUNDS FOR THE TYPE OF PROGRAM YOU HOPE TO FUND? WHAT KIND OF PROGRAMS HAVE THEY FUNDED IN THE PAST?*

Your LOI should be 2 pages or less and include the following information:

1. Name, street address and other contact information (email address, telephone number) of grantor organization, foundation, or company providing the grant opportunity
2. Name of contact person at funding agency
3. Link to the application portal
4. Program(s) that the chapter proposes to implement and desired outcome (one paragraph) should they be awarded the grant funds;
5. Amount of funds being sought; amount of funds available for grant award
6. Deadline date for grant submission

Once the LOI has been reviewed, DREF staff will schedule a meeting with the chapter to fully discuss the grant application process, including submission windows, deadlines, required DREF financial documents, chapter readiness and appropriateness of the request, etc. Upon receipt of the LOI, DREF will respond within 10 business days. DREF is unable to support ‘last minute’ (less than two weeks) requests. **A full copy of the grant submission must be provided to DREF.**

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If you are alerted that you will receive funding, prior to receiving it, all grant recipients must sign a DREF [‘Grant/Scholarship Agreement’](#). Organizations wishing to apply in collaboration with another group only need to submit one application with a letter of support from the collaborating organization. All funds received by recipients must be spent in the time period specified in the grant agreement.

While generally not a focus area, all requests for operational funds for a 501C3 organization must be explained on the application or on the budget request.

If your grant application process is successful and you are awarded a grant, you are required to forward a copy of the grant award letter to DREF. All grant recipients must also complete a DREF [‘Grant Report’](#) form to DREF at the end of the stated grant period and prior to requesting (or being approved for) additional funding.

To summarize the process, you must follow these 9 steps:

1. DST chapters must contact DREF at chapterengagement@deltafoundation.net to express interest in applying for grant. This must be done at least 30 days before the stated grant application due date. (Submit your Letter of Intent (LOI) , the name of grant, the application portal link, amount requested, the intended use(s) by chapter, and the grant application deadline). You must schedule a meeting with DREF Charitable Engagement staff. All grant requests must mirror DST’s 5 Point Programmatic Thrust and be supportive of DREF’s mission. The grantor must be an organization also aligned with DST/DREF missions and standards. No alcohol, no cannabis, no objectionable or political motivations. After the chapter makes the initial contact with DREF staff, DREF staff will send this document.
(3rd Party Grant Procedure and Required Documents)
2. Your chapter must send grant application for review, prior to meeting/call with DREF staff. You must also send a brief description of the mission and work of the grantor (sponsoring organization).
3. DREF Charitable Engagement staff and chapter representatives will meet via Zoom or conference call to talk through your chapter’s intended use of funds, if received, grant requirements and documentation needed to complete grant. (Who will do what. What is needed). **DREF will not send any proprietary documents or information directly to chapters.** It will only be submitted through/uploaded to the grant portal or directly to the funder.
4. DREF staff will share meeting notes and highlights with DREF President/Executive Director for preliminary approval.

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5. DREF staff and your chapter will jointly create a timeline, which builds in time for grant application form completion, review by both parties, approval from DREF's Executive Director w/signature and submission.
6. Your chapter is responsible for setting up grant application online account prior to handing off information to DREF. Chapter must provide grant portal log-in credentials to DREF staff.
7. Your grant application must be reviewed by chapter representative, DREF charitable engagement staff and Executive Director prior to being submitted. That means you must send a full copy of the grant submission to DREF. Chapter is responsible for completing the grant application and submitting it.
8. Upon notification of grant award, chapter should send copy of award letter/notification to DREF and submit a grant scholarship agreement form, which can be found in the DREF '[Charitable Engagement Manual](#)' or on the DREF website.
9. Your chapter is responsible for ALL reporting due to the grantor. You should copy DREF on all reports, documents and deliverables submitted to the grantor. These items should be submitted along with the DREF 'Grant Report' form at the end of the grant period). A narrative must be included. (Refer to the DREF "[Grant Report](#)" form on the DREF website and also refer to in the DREF '[Charitable Engagement Manual](#)').

All forms can be found on the [DREF website](#). They are both downloadable and fillable,

Funding requests from a specific foundation fund (donor restrictions may apply)

When the DREF Board of Directors has accepted funds from a donor with a restriction which meets our charitable and educational purpose, it is the Board's decision to make on granting and releasing those funds in accordance with the donor's restrictions. Because of the varied nature of these restrictions, there is no one application to meet all funds' requirements. DREF will make applications for these funds available online. NOTE: The funds' funding period is established by the Board and/or donor if applicable.

Procedures for Service Provider Agreement

If DREF needs resources, particularly Human Resources, to implement a donor's intent, then a [Service Provider Agreement](#) or a grant to Delta may be necessary to implement the program in local communities. Reporting requirements will be customized based upon DREF's and other donor's requirements.

Custom Grant Reports. In addition, custom grants may have enhanced reporting requirements, since there is another donor involved. Therefore, DREF will require reports containing information

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either from our report format, the other donor's report format (or both). Due to the involved nature of custom grants, DREF requires a minimum 30-day notice to review and approve your Letter of Intent (LOI). Some funders may also request a LOI as a part of the grant application. Delta chapters are required to complete the funder's application; DREF staff will assist where needed and will provide required supplemental documents, i.e. proprietary financials, DREF Board of Directors demographics, anti-lobbying policy, DEI policy, etc. If extensive assistance is required to complete a grant application, serious consideration must be given to either submitting the proposal earlier to DREF or opting to submit your grant application in a later application window. Due to the number of requests and DREF's limited staff size, DREF cannot and will not rewrite grant proposals. For guidance with third-party grant submissions, please contact DREF's Director of Programs, Dr. Antoinette Rogers or the DREF Charitable Engagement Engagement team.

How DREF Distributes Funding

Grant Disbursement Goals

- To support the programmatic mission and the charitable and educational programs of Delta Sigma Theta Sorority, Incorporated and its chapters and other organizations with similar charitable and educational purposes.
- To act as good stewards of foundation resources by distributing funds in a fair and accountable manner.
- To evaluate program successes and accomplishments.
- To honor the requests of benefactors in the distribution of income from endowments where DREF is named as the trustee.
- To honor the requests of donors in the distribution of contributions from restricted funds where the donor's intent is consistent with the charitable and educational purpose of DREF.

Eligibility/Areas of Funding

Based on its mission and goals, DREF selects candidates to receive funding. Only Delta chapters, community-based organizations with 501C3 status and programs that are in alignment with our charitable and educational purpose are eligible to receive funding.

General Requests for Funding

While DREF will normally request grant applications or proposals when it has funds available for distribution, Delta chapters and other organizations may submit Letters of Intent (LOI) for funding outside of an advertised funding period. Keep in mind that there may be **limited to no funding** available outside of advertised grant periods. Please use the criteria for Letter of Intent format described on page 24.

Fiscal Agents: DREF can act as a fiscal agent for a chapter. Chapters are not 501C3 organizations; they are 501C7 organizations and do not/cannot act as a 501C3 does. However, DREF can work with

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a chapter and potential funder in a grantor, grantee, sub-grantee relationship. Please follow the custom grant process discussed above. Some smaller 501(c)(3) organizations have potential funders but not the infrastructure to fully support the administrative aspects of a grant. If you are a 501C3 organization such as a local chapter foundation, please follow the custom grant process on page 23 to request a fiscal agent relationship. Note that Provider of Service Agreements and/or grantee/sub-grantee relationships are preferred over fiscal agency. Fiscal agent relationships will require more scrutiny by DREF's Board of Directors. All relationships with DREF are at the discretion of the Board and fiscal agent relationships may not be approved.

To request funds from your Donor-Restricted fund at DREF to conduct public service programming, please complete, sign and submit the DREF '[Individual or Delta Grant Request](#)' form to DREF at least 15 business days in advance of when the funds are needed.

- Be sure that your request is included on the correct form and completed correctly with signature of chapter president included.
- A program budget as well as a brief narrative explaining how the fund will be used must accompany the request. Grant requests that do not include a budget will not be processed.
- By default, a check will be mailed. However, funds can be sent electronically – a much faster process - via ACH if the chapter provides its banking information on page 2 of the form. ACH transmission is preferred for amounts of \$10,000.00 or more.

DREF Community Empowerment Grants

In the true sense of the 'grant application process', DREF *does* offer ONE grant program, its annual 'Community Empowerment' Grantmaking Program. It is open to all Delta chapters that have established DREF funds, with the application process opening in November and the deadline submission date in late March to early April of each year. Chapters are encouraged to apply for program grants in the areas of Civic Engagement, Education, Financial Literacy, Health and Wellness, and International Awareness. Periodically, the foundation may relegate grant programming opportunities to a specific niche area such as gun violence prevention, the U.S. Census, financial literacy, or other topical issue. Chapters can submit only one application per funding cycle. Delta chapters that have received funding for three consecutive years must refrain from applying for one year.

- Organizations wishing to apply in collaboration with another group only need to submit one application with a letter of support from the collaborating organization.
- Applications meeting all requirements as listed on the website will be reviewed by a committee of non-DREF judges. The committee will make funding recommendations to the DREF Board of Directors for approval.
- Recipients are notified by the end of the summer of each grant year, and grant checks are mailed directly to the chapter. Chapters that are awarded the grant are announced at Delta Sigma Theta Sorority, Incorporated's Regional and National Conventions.

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- Prior to receiving funding, chapter grant recipients are required to sign and submit a DREF [‘Grant/Scholarship Agreement’ form](#).
- All funds received by recipients must be spent in the time period specified in the grant agreement.
- While generally not a focus area, all requests for operational funds for a 501(c)(3) must be explained on the application and on the budget request.
- Grant recipients must complete a DREF [‘Grant Report’ form](#) at the end of each grant period and prior to requesting (or receiving) any additional funding.

NOTE: *Funds received through the Community Empowerment Grantmaking Program cannot be used for the following:*

- 1) *Direct funds to individuals*
- 2) *Contributions to fundraisers, events or drives, nor for*
- 3) *Debt elimination.*

For more information on the program, visit the DREF [website](#).

Grant Agreement and Funds Transfer

If DREF and/or other funders approve your grant request, a DREF [‘Grant/Scholarship Agreement’](#) will be sent to you via email. This agreement restates the grant amount, the grant purpose and includes a detailed description of how the grantee should account for funds. It is a way to ensure a shared agreement on the use of funds. DREF must receive a copy of the signed *Grant Agreement* before funds can be sent to the grantee. DREF will ask the grantee to confirm the receipt of funds.

How DREF Monitors Funds

Reporting

Attached to the DREF [Grant Scholarship Agreement](#) should be a DREF [report form](#) that includes the dates by which reports related to the grant are due. Final reports must be submitted within 15 days of the end of the grant period or sooner if required by an outside funder. **Failure to submit a final report may disqualify an organization from future funding.**

Final reports should be submitted to the attention of the Director of Programs, Dr. Antoinette Rogers (E: arogers@deltafoundation.net). Some grants, especially those involving additional funders, will require interim reports in the middle of a project and/or at the end of your organization's fiscal year. If this is the case, these additional reports will be clearly described in your grant agreement and attached.

DREF expects to receive reports and an accurate accounting of expenditures in a timely manner. The reporting required applies to all grants/scholarships given, even grants/scholarships from chapter restricted funds.

Grantees are required to share with us your photos, press releases, stories and other material that would be of interest to both donors and grantors. Also, you are encouraged to submit a short narrative (less than 100 words) describing the activity. Contributors to causes appreciate feeling more in touch with the work they fund, and nothing does this better than stories, photos and videos. Some of these submissions will be featured on DREF's website and in DREF publications. This information can be submitted with the final report or sooner if available. DREF's [Grant Report](#) form can be used for this purpose; a grant narrative must accompany the submitted form.

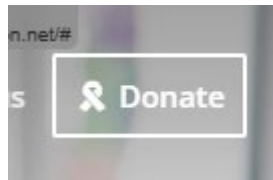
Grantees must mention DREF or other donor support in press releases, articles, program books and other forms of public communication. We do ask that you submit a draft of all related written material to DREF at least seven business days in advance of release for internal review. Failure to comply with reporting requirements will prohibit DREF from providing you with any further funding until the reporting deficiencies are corrected.

Ways to Donate to DREF

Finally, but definitely important, what are the best ways to support DREF? By donations. Donations can be made to DREF in a variety of ways:

Online

There is a **DONATE** button on the upper right-hand corner of the DREF website. This allows you to make your donation online via credit card or personal check.



By mail

Donors (non-chapter) should mail checks/ money order contributions to:

Delta Research and Educational Foundation
PO Box 640898
Pittsburgh, PA 15264-0898

with the name of the chapter that the donation should be recorded to.

Checks must be made payable to DREF only. Checks with other payees listed (e.g. XYZ Chapter) will be returned because DREF's banking affiliates cannot process them. To donate by credit card, complete the DREF [Donation or Pledge Form](#) or go to <https://deltafoundation.net/donation>. **Do not send credit card information by email.**

Pledges (meant for large dollar amounts)

- Large pledges are generally payable over a maximum 3-5-year period.
- Complete the DREF '[Donation or Pledge form](#)' and submit it to DREF via email.

Workplace Giving

Many employers offer a variety of ways for employees to make charitable contributions through payroll deduction. Often, these gifts may be matched by the employer. Examples of workplace giving include, but are not limited to: employer volunteer and/or match programs such as the Combined Federal Campaign (CFC), and State Employee campaigns. **EFFECTIVE IMMEDIATELY, DREF no longer participates in the annual Combined Federal Campaign.**

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For other employer-directed giving programs, donors are required to complete their employer's workplace giving form and follow the employer's instructions for submission. **IMPORTANT: You MUST indicate your chapter name for it to receive the money.** If you do not, it will be considered a general donation to DREF; not to your chapter.

In addition to your employer's required paperwork, you must complete/submit DREF's '[Workplace Giving](#)' form to alert DREF of your incoming gift. If the employer requires specific information from DREF to complete their process, please forward the form to the DREF Charitable Engagement Management Service once the other sections have been completed. Send a copy of your employer's completed 'Workplace Donation' form along with your completed DREF form.

Please note that **your chapter's name must be entered on this form** (Check the box for Restricted to Chapter Educational/Charitable Programs' and enter your chapter name below for the donation to be property credited to your DREF fund. .

Purpose:

<input type="checkbox"/> Unrestricted to DREF	<input type="checkbox"/> Restricted to Chapter Educational/Charitable Programs
<input type="checkbox"/> In Honor of _____	_____
<input type="checkbox"/> In Memory of _____	<input type="checkbox"/> Restricted Other _____

Where applicable, your employer's gift may be matched – perhaps, 100% or more - with the employee's purpose unless noted otherwise by the employer.

PayPal Giving Fund

If you use PayPal, you can designate a \$1.00 donation to DREF with each PayPal transaction. You must first sign up on PayPal and select the Delta Research & Educational Foundation as the recipient of your gift. Once you have completed your transaction, you should see this message offering you the opportunity to make a \$1.00 contribution to DREF.



At the end of the tax year, you can sign on to your PayPal account to download a donation report that you can use when you file your taxes .

Bequests

Donations can be made to DREF from the estate of a loved one. Please note the following:

- DREF does not accept insurance policies not securities as donations. They must first be liquidated so that the financial proceeds can be donated to DREF (for example, to establish a scholarship fund in memory of your departed loved one).
- DREF, a 501C3 public charity, does not offer financial services advice. Please consult with your financial services firm before contacting DREF.

Preferably, donation made from processed bequests should be made by having the donor – individual or financial services company complete/sign a DREF '[Donation or Pledge form](#)' ** and mailing it along with the donation check** (**MUST BE made payable to 'Delta Research & Educational Foundation'**) to our (financially secured) lockbox location:

Delta Research and Educational Foundation
P.O. Box 640898
Pittsburgh, PA 15264-0898

It is vitally important that your chapter's name be entered into Section III of the form so that the money is properly credited to your chapter's DREF fund

III. PURPOSE	
<input type="checkbox"/> Unrestricted to The Delta Foundation	<input type="checkbox"/> Restricted to Chapter Educational/Charitable Programs
<input type="checkbox"/> In Honor of _____	_____
<input type="checkbox"/> In Memory of _____	<input type="checkbox"/> Restricted Other _____

If funds are being sent by a financial services firm, there is the option to send funds electronically (via ACH). Hopefully, the firm can supply its form to DREF to request DREF's ACH info. If not, please contact DREF so that arrangements can be made to convey electronic payment info to the firm.

***This form can also be used to make donations paid with a credit card (if that is preferred). See Section IV of the form. However, it is highly recommended that the completed form NOT be sent electronically once credit card info is entered (due to the potential for online interception) that can occur when transmitting financial information.*

IV. METHOD OF PAYMENT	
<input type="checkbox"/> Check enclosed, Please make checks payable to " Delta Research and Educational Foundation "	
<input type="checkbox"/> Please bill my credit card: Card type: <input type="radio"/> Visa <input type="radio"/> MasterCard <input type="radio"/> American Express <input type="radio"/> Discover	
Account number: _____	Expiration Date: _____ CSC/CVV2: _____
Billing Address: _____	
City: _____	State: _____ Zip code: _____
Authorized Signature: _____	

GIVING TUESDAY

Giving Tuesday is a global generosity movement unleashing the power of radical generosity. It was created in 2012 as a simple idea: a day that encourages people to do good. Since then, it has grown into a year-round global movement that inspires hundreds of millions of people to give, collaborate, and celebrate generosity. **Giving Tuesday is always the first Tuesday following the US Thanksgiving holiday.** That time of the year traditionally marks the start of the year-end giving season for charitable organizations.

When you make your charitable donation on Giving Tuesday, **that money supports the Delta Research & Educational Foundation; not individual chapters/fund holders. In other words, the money that is donated goes directly to support DREF. It does not go to your chapter's DREF fund.** For more info, read more about Giving Tuesday [here](#). While the organization behind GivingTuesday does not match donations, many companies offer matching programs in honor of the day. The nonprofit you choose to support can confirm if your donation is eligible for a match.

Learning More About DREF

Chapters often have questions about DREF: *What does DREF do? What does DREF not do? How can chapters work with DREF? What chapter-specific information is needed?* We understand that because.....**THINK ABOUT IT.....***When was the last time you can recall hearing DREF mentioned in your chapter meeting?* Likely, never.

So, how are you expected to know about DREF? That is what the DREF Charitable Engagement Management Service is here for. In the past, DREF has made presentations at DST's regional and national conventions. Most recently, chapters have 'met' with DREF staff using Zoom sessions to get their questions answered and learn more about how chapters can work with DREF. But, if you are reading this document, you have come to the right place to begin learning about DREF. This along with the DREF website in addition to sending your questions to chaptermanagement@deltafoundation.net or by calling DREF's Charitable Engagement Management Service should supply you with most of the answers to your questions.

In lieu of Zoom meetings with chapters that are generally requested for week nights or weekends across several different time zones as well as reduced staff sizes, it has become untenable and unreasonable for DREF staff to hold evening/night meetings in addition to a full DREF work day. So, we have come up with a solution.



DREF will be releasing an educational training video/webinar in the very near future. We anticipate that it will be posted on the DREF website so that it can be viewed at your convenience. **Stay posted for the announcement.**

Glossary of Terms and DREF Forms

Days When referring to a specific number of days in the Charitable Engagement Manual, the reference indicates business days (*Monday through Friday 9:00AM to 5:30PM ET only*) unless otherwise noted.

Delta When using the term 'Delta' in the Charitable Engagement Manual, DREF is referring to chapters, regions, or the Grand Chapter of Delta Sigma Theta Sorority, Incorporated.

Donation A donation is a monetary gift to a charitable entity without receiving a good or service in return. DREF distributes digital donation acknowledgment letters for donations of \$250.00 or more per IRS Publication 1771. The donor's name, donation amount, date and his/her email address are required to distribute the letter.

Donation or Pledge form Used by individuals or Delta chapters/regions when contributing to DREF. This form is often used by Delta chapters when establishing Donor Restricted Fund.

Donor Restricted Funds A reserve of money that can only be used for specific purposes. Donors are assured that their charitable contributions will be used in a manner that they have determined and are consistent with the mission of the non-profit organization receiving their restricted donations.

Endowment Funds set aside for the long-term benefit of charitable and educational programs. The standard industry practice is to keep the principal intact and award only the interest/gains earned for charitable and educational programs, i.e. scholarship funds, fellowship funds, etc.

Establishing a Donor Restricted Fund or Scholarship form Used to establish a Donor Restricted Fund or Scholarship Fund at DREF.

Federal Employer Identification Number (FEIN) The Federal Employer Identification Number (FEIN) [also known as the Employer Identification Number (EIN)] is the corporate equivalent of a Social Security Number issued by the US Internal Revenue Service. Potential corporate donors often request a non-profit's FEIN number, which can be used to verify the organization's status, assets, and liabilities. **This information is not available on the DREF website.** An IRS W-9 form can be provided to potential donors. Contact chapterengagement@deltafoundation.net. to request it.

Fiscal Agent A non-profit 501 (c) (3) organization assumes the role of fiscal agent to enable another entity to receive charitable funds to implement charitable and educational programs, particularly grant funds. The fiscal agent is responsible for managing and disbursing all funds related to the grant. The non-profit 501C3 organization and the project/grant coordinating agency must enter a formal agreement or Service Provider Agreement to solidify the fiscal agent relationship.

Foundation A foundation is a non-governmental entity that is established as a non-profit 501 (c)(3) to support and/or perform charitable and educational programming. Primary duties of foundations range from receiving charitable donations, to awarding grants and scholarships.

Fund Change Request form Used to change information related to a Donor Restricted Fund or Scholarship Form, e.g. name of fund, name of Authorized Representatives, contact information, etc.

Fundraising Event Application and Agreement form Used by Delta chapters/fund owners to notify DREF of intentions to hold an upcoming fundraising event.

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Grant Report form Used to report output/outcome of funds, grants, scholarships awarded by DREF to Delta; formerly identified as Final Grant Reporting Form.

Grant Scholarship Agreement form Used to document terms of agreement for grant and scholarship awards made by DREF.

Grantee One to whom a grant is given. For example, your chapter.

Grantor Any funding source that has agreed to provide financial support in the form of a grant, such as the Kellogg Foundation, the American Heart Association or the National Basketball Association.

Individual or Chapter Grant Request form Used to request funds – as a direct grant or a reimbursement for funds that have already been expended - for charitable and educational programming.

Individual or Delta Scholarship Request form Used to request funds for scholarship funds. Always made payable to the educational institution; not to the student. Can only be applied towards tuition expenses.

In-Kind Donation Gifts made to charitable and educational programming in the form of goods and services; non-financial gifts. For example, Greenway Printing Company prints the event programs at no cost for the Grateful Alumnae Chapter's Scholarship Awards Program. Or, XYZ Retailer donates a dozen \$50 gift cards for Grateful Alumnae to giveaway as incentives for students to achieve academic success (Honor Roll Status). These would be considered as in-kind donations.

Letter of Intent (LOI) A letter (usually no more than two pages in length) describing a proposed project and including a budget estimate and background information presenting background and justification for a grant application.

Lockbox A service provided by banks to companies for the receipt of payment from customers. Under the service, the payments made by customers are directed to a special post office box instead of going to the company. The bank goes to the box, retrieves the payments, processes/deposits the funds directly into the company's bank account. DREF started using lockbox service in 2021 as an added security enhancement feature .

Matching Gift Also referred to as matching fund or matching donation. A charitable donation from an employer/corporation to a non-profit 501 (c)(3) organization on behalf of an employee. Matching gifts are a key component in Workplace Giving. Typically, companies match the donation made by employees 1:1, i.e. if an employee donates \$100 to a non-profit, the employee's company will donate \$100, giving the receiving charity a \$200 contribution. The matching level varies and can be at a lower or higher match rate. Some matching gift companies will match the gifts made by the employee's spouse or donations from company retirees. Also, some companies offer monetary donations to charitable organizations on behalf of the volunteer service offered rendered by employees.

Planned Giving Planned giving is another aspect of fundraising that can be referred to as gift planning deferred giving, which allows a donor to bequeath money/assets to a non-profit upon his or her death. This type of charitable giving involves cash, bequests, trusts, estate planning and other assets.

Remittance form Used by Delta chapters to remit financial contributions (ex. donations from special events and other fundraising activities) to their Donor Restricted/Scholarship Fund at DREF.

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Service Provider Agreement form Used to document terms of agreement for service provided by consultants rendering professional services to DREF.

Sub-Grantee As a non-profit 501 (C)(3) organization, DREF is positioned to receive grant funds, sponsorships, and other charitable donations on behalf of Delta chapters. In this regard, the Delta chapter will be considered the “Sub-Grantee” that will implement the program aspect.

Third-Party Grant A third-party grant is any grant requested and initiated by an entity other than DREF. This type of grant is the result of Delta chapters responding to an RFP (Request for Proposal) from a funding source, e.g. American Heart Association, government, another foundation).

W-9 Form An US Internal Revenue Service document which is used to certify an organization’s tax identification number and 501C(3) status. Corporate donors typically ask charitable entities to complete a W- 9 form in order to receive a charitable donation from that company. The charitable entity (DREF) will in turn complete the form and return to company, giving the company the necessary information to verify DREF’s tax status. NOTE: *W-9 forms are distributed to business entity donors; no to individual non-business owner donors.*

Workplace Giving form Used by donors to inform DREF that a matching gift, monthly donation, and/or general donation will be made on his/her behalf and his/her employer will also make a ‘matching’ donation. This request is usually processed via the employer’s payroll deduction program.

FAQs (Frequently Asked Questions)

CEM Presentation and Webinar Trainings

1. Once recorded, will the new training video be made available to share with Delta chapter members?
Yes, the video will be provided on the DREF website(www.deltafoundation.net). Announcement date to be determined.

2. Can DREF present this webinar to chapters? Are chapters charged a fee?

Currently, DREF's Charitable Engagement Management Services no longer has the bandwidth nor staff size to present webinars to chapters. Delta chapters have never been charged a fee for this service and that will not change. We ask that you contact DREF's Charitable Engagement Management Service at chaptermanagement@deltafoundation.net.

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

Yes. Donors will need to fill out the DREF '[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 DREF Charitable Engagement Service staff at chapterengagement@deltafoundation.net or DREF's Donor Manager to follow up on any workplace giving activity designated as a donation to a chapter. The donor should submit both the DREF form as well as a copy of their employer's employee donation form.

IMPORTANT: The name of the chapter to receive the donation MUST be placed on the form.

Establishing Donor Restricted Funds

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

Yes. Delta Chapters would need to submit a new '[Establishing a Donor Restricted Fund or Scholarship](#)' **form** to establish an additional fund. This step formalizes the process that allows chapters and another fund holders to avail themselves of the services of a fiscal agent such as sDREF. Delta chapters must also be mindful when submitting the DREF '[Remittance](#)' form to clearly state which DREF fund the money being sent should be credited to.

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 fundraising event.

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Fund Balance Reports

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

The chapter should first contact DREF's Charitable Engagement Management Service at chapterengagement@deltafoundation.net. Be prepared to provide all the documentation justifying what you think the balance should be (including copies of remittance forms and copies of received checks).

The Charitable Engagement Management Service will then work in tandem with DREF Finance to review DREF's records and compare them to your documentation in an effort to resolve any issues.

2. How are fund balance reports distributed?

All fund balance (digital) reports are distributed electronically via email on a quarterly basis. If there are changes in the chapter's leadership team, the DREF '[Fund Change Request](#)' form should be submitted to chapterengagement@deltafoundation.net to update DREF of the new contact information. This will ensure that your chapter automatically receives its report.

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 considered 'games of chance' which DREF does not support.

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. In fact, DREF's name should not appear on any legal contracts that the chapter enters into. An extensive list of activities DREF does not fund is located on page 21 of this document.

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

Yes; it is a **mandatory** step – whether or not actual monetary gains will be made. And all event-related collateral (flyers, Save-The-Date cards, etc.) as well as the sponsorship package **must be co-branded with the DREF logo**. Contact DREF's Charitable Engagement Management Service to request the logo. NOTE: This statement should appear in all outward facing event communications: ***"This event is jointly sponsored by the [your chapter name] Alumnae Chapter and the Delta Research & Educational Foundation."*** Finally, all event market collateral as well as the sponsorship package must be forwarded to DREF for review and approval prior to any public distribution.

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?

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This is not the chapter's responsibility and potentially constitutes a tax liability for the chapter. **Chapters are strongly discouraged from indiscriminately calculating taxable amounts.** Any incidents of this will be reported to Director of Finance of Delta Sigma Theta Sorority, incorporated. However, acceptable language for any promotional materials is "A portion of the ticket proceeds are considered tax-deductible to the extent allowed by law." From a strictly accounting perspective, the deductible amount of the ticket is the face value of the ticket minus the individual cost of consumables such as food and beverages, and entertainment and/or giveaways for the event.

5. How should we collect donations from fundraising events?

Complete and submit the DREF '[Remittance](#)' form. Delta chapters should "bundle" their collected donation checks and mail them to the DREF lockbox.... **NEVER to DREF's physical building** in Washington, DC

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

In a perfect world, DREF processes and approves fundraising event applications and agreements within 30 business days. Therefore, it is in the chapter's best interest that the request be submitted as far in advance as possible to allow ample planning time since you are prohibited from marketing, soliciting sponsors nor selling tickets (if applicable before your request has been approved by DREF).

NOTE: All received requests are processed on a FIFO ('first in...first out') situation. When your request(s) is processed depends on where you fall in the request queue. Mailed checks and ACH payments are handled by an external vendor; therefore, you should allow for additional time needed for money to reach its destination.

7. If collaborating with another D9 organization 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 DREF '[Fundraising Event Application/ Agreement](#)' form **must** first be completed and approved between the Delta chapter and DREF. A MOU (**Memorandum of Understanding**) between the chapter and the D9 organization is strongly recommended. Contact DREF's Charitable Engagement Management Service at chaperengagement@deltafoundation.net to get info on the creation of MOUs. All MOUs must be submitted for approval by DREF prior to the event being held.

General Questions

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

No. DREF currently does not provide grants to any organizations outside of Delta Sigma Theta Sorority, Incorporated. However, Delta chapters (both with DREF donor-restricted funds and without donor restricted funds) may apply for grants through DREF's annual [Community Empowerment Grantmaking Program](#). That is DREF's sole grant program for chapters. See the [DREF website](#) for more info.

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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 that platform. DREF's current online banking fee for EFT and credit cards is 3% plus \$0.75 per transaction. The fees are not set by DREF. Those fees are reported on your chapter's quarterly eReport.

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

No. DREF does not charge an administrative fee for our Charitable Engagement Service. Fees were 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 as follows: *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 within 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?

No. The most recent edition is this edition, released in 2024. Prior to this edition, the last edition was released in 2018, 7 years ago. DREF will inform fund holders via email as well as on the DREF website when the most recent update to the Charitable Engagement Manual is made available. We anticipate the release of the new edition to be during mid-year 2026.A

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 its purpose. Delta chapters with foundations are encouraged to contact DST's National Housing and Properties Committee for guidance on how Delta Chapter foundations must be maintained.

Scholarship and Grant Requests

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

All scholarship requests require the submission of the DREF ['Individual or Delta Scholarship Request'](#) form with the following confirmed information for **each** scholarship recipient:

- Student's name
- ID Number
- Scholarship dollar amount

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- The confirmed mailing address of the school and office (Bursar/Student Accounts) where the scholarship funds should be received and processed. **DO NOT USE THE SCHOOL'S 'GENERIC' MAILING ADDRESS SHOWN ON THEIR WEBSITE.**
- A confirmation of current enrollment (ex. a class schedule). NOTE: *A school billing notice is **not** a confirmation of enrollment.*

Please confirm this information directly with the school prior to submitting the request(s). This information is critical to ensure the student's scholarship is processed and sent to the correct university office. Bad addresses mean that scholarship money will not reach the student's account in a timely manner.

2. Can scholarship funds go directly towards the students?

No. Scholarship funds cannot and are **never** issued to the student. They are issued to the school in care of the student. Scholarship funds are also never issued to parents of students. This ensures that DREF stays within the IRS guidelines for charitable and educational charities of distributing scholarship funds specifically and directly for educational purposes – such as tuition - only.

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

Due to the high volume of requests DREF receives, we are unable to provide confirmation of the release of scholarship checks. All payment transactions are processed by an external vendor; therefore, DREF is not always aware of exactly when payments are made. Delta chapters are encouraged to contact DREF's Charitable Engagement Management Service at chapterengagement@deltafoundation.net should there be a concern of a check/ACH payment not being received at the school within 30 days from submission to DREF. Experience has shown that scholarship funds reach schools approximately 3 weeks once the request has been approved for payment.

NOTE: DREF does not create checks nor transmit payments. This process is facilitated by a contracted external/third-party vendor which does not provide processing time information to DREF. During the busy scholarship season (August through October), hundreds of requests are processed – some times, 25 from one chapter - and there may be some time delays due to the detail oriented work required to review and "package" each request to ensure the integrity of the information that has been provided.

4. If a student's account is in excess/has a zero balance 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 solely by the chapter** because that money belongs to the chapter that is giving the scholarship. Should the school contact DREF inquiring if a student can receive a refund, DREF will immediately contact the sponsoring chapter's President, Treasurer, or Authorized Representative to ask their preference for next steps/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.

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Third Party Grant Applications

1. How does DREF assist with third party grants?

DREF can serve as the 501(c)(3) fiscal partner entity that can receive grant awards from various organizations. Working directly with DREF is the **ONLY** way that Delta chapters can qualify to apply for nonprofit grants; therefore, the chapter **MUST** setup a fund at DREF. Chapters are asked to contact DREF **no less than 30 days** prior to the grant application deadline to allow DREF enough time to review: **NOTE: This is all predicated on the premise that the chapter that wants to apply for third-party grants has established a DREF fund.** The chapter is required to submit a Letter of Intent (LOI) for DREF review and approval. It must include the following information:

- The grant application portal link to determine what documentation is required;
- The grant application deadline;
- The grant amount requested;
- Which chapter programs (mirroring DST's 5-point programmatic thrust) that grant funds will be used for. The chapter must provide a detailed synopsis of how they plan to execute the program as stipulated in the grant guidelines. For more info, refer to pages 31-35

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

No. There is no specific dollar amount threshold. Chapters are advised to review the grantor's website or contact one of its Grant Managers to determine the dollar amounts that are typically awarded so that your grant request amount will not be an outlier. Sometimes, this info can be found on their websites. Major third-party grants are often administered through foundations based on the volume of 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 conduct their own "prospect research" and start engaging local foundations and entities in their service areas in hopes of discovering if there are any available nonprofit grant opportunities, Chapters are also encouraged to purchase a subscription to a verified source, such as

- The [Foundation Directory](#), the seminal industry repository of grant information; or
- [GrantStation](#); or
- [Instrumentl](#). . .

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Working With DREF

All DREF forms can be found on the DREF [website](#), as well as in DREF's '[Charitable Engagement Manual](#)'. It is strongly encouraged that all chapters/fund holders review this document. All DREF forms are both download-able and fillable; therefore, there is nothing that needs to be printed. . To request service from DREF, you must submit the properly completed and signed form for processing. **DO NOT REFORMAT DREF FORMS**.....even if a section of the form is not applicable to your chapter. **DO NOT REMOVE THAT SECTION OF THE FORM.**

- Setting up a DREF fund

This is the first and necessary step to formally establish a working relationship with DREF. This establishes the connection with an IRS-certified 501(C)(3) organization that you will need (for tax exemption purposes, to qualify you/your chapter to apply for nonprofit grants, etc.).

1. Complete/sign/submit the DREF "[Establishing A Donor Restricted Fund or Scholarship](#)" form via email to your CEM team member for processing. **The required (minimum) \$1,000.00 remittance to setup the fund is no longer required.** Once the fund is setup, a fund eReport will be sent each quarter to the two individuals you indicated on the form submitted to setup the fund. Quarterly reports are sent electronically to give your chapter its current fund balance as of the end of that quarter.
 - a. **DREF does not assign/use account numbers to funds.** By default, the fund name will be your chapter's name; however, you have the option to give it a different name. Please indicate that on the form.
2. **Please allow a minimum of up[to three business weeks for processing** your paperwork to setup the fund. Once your fund has been setup, you can add additional monies (ex. proceeds from fundraising events) to it by sending 'bundled' checks with a completed/signed DREF "[Remittance](#)" form to DREF's lockbox¹. NOTE: All checks **must be written to 'Delta Research & Educational Foundation'**. **NO EXCEPTIONS.** DREF's banking institution will not process them; they will be returned to you. NOTE: There should be nothing listed on the Remittance form that is not included with the form.

¹DREF Lockbox Info and Instructions

USPS

Delta Research & Educational Foundation
PO Box 640898
Pittsburgh, PA 15264-0898

Overnight Mail

PNC Bank
c/o Delta Research & Educational Foundation

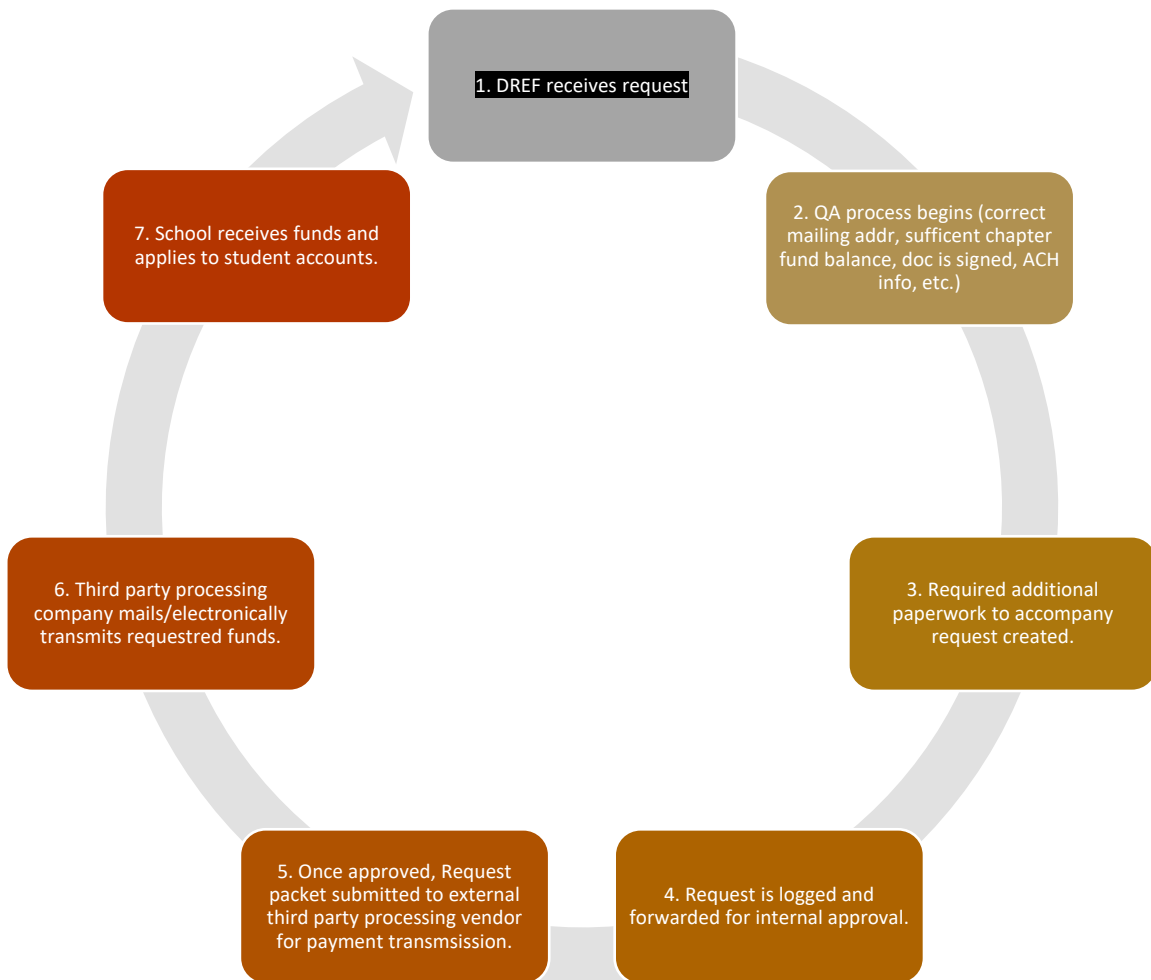
:

Lockbox Number 640898
500 1st Avenue
Pittsburgh, PA 15219

Remittances received without a properly completed 'Remittance' Form will not/cannot be processed. They will be returned to you.

- Scholarship Requests

Per IRS, only DREF can distribute scholarship monies from your DREF fund. For each student recipient, complete/sign/submit a DREF [*Individual of Delta Scholarship Request*](#) form along with a confirmation of current enrollment. By default, a check will be mailed to the institution. However, you have the option of funds being sent electronically, but you must contact the institution to secure their ACH info and enter that information on page 2 of the form. Please allow up to three weeks for processing, particularly during the busy scholarship period (August-November). Refer to the chart below to better understand the lifecycle of a DREF scholarship request.



What actually happens when scholarship requests are submitted to DREF

- a) Request forms must be closely reviewed for completeness (“Is there a student ID# on the request form?” “Is the mailing address on the form the correct office that processes tuition payments? (*not the school’s generic mailing address*). “Is there a different mailing address for “external” scholarships?” “What is the email address for the office that processes tuition payments?”;

II. Scholarship Request

Requested scholarship amount		Requested fund that scholarship should be paid from (if known)	
Name of Student		Student ID Number	
Address			
Phone			
Name of Institution			
Address			
Phone		Primary contact person if known	
Educational/Charitable Purpose of Scholarship:			

b) Then, the Charitable Engagement Management Service team must confirm that your chapter’s fund has a sufficient balance for these request(s). If the scholarship is to be paid electronically, was the ACH information for the school provided on page 2 of the form? Was a blank, voided chapter check sent with the form?

Electronic Funds Transfer (EFT) Enrollment
PLEASE INCLUDE A CONFIRMATION OF ACCOUNT INFORMATION ON BANK LETTERHEAD OR A VOIDED CHECK.
 The documentation submitted should contain the name on the account, routing number, account number and type. If submitting bank letterhead, the bank officer’s name and signature is also required. This information will be used to verify your account number. NOTE: Starter checks are not acceptable for EFT confirmations.

New EFT Enrollment
 Change to Current EFT Enrollment (e.g. account or bank changes)
 Cancel EFT Enrollment

PART I: BANK ACCOUNT HOLDER INFORMATION (PLEASE PRINT)

College or University Name on Account _____
 Address of Account Holder _____

PART II: BANK INFORMATION

Bank Name _____
 Bank Address _____
 Bank Telephone Number _____
 Routing Number (must be 9 digits) Account Number (include all zeros) _____

Type of Account (check one)
 Checking Account
 Savings Account

PART III: AUTHORIZING SIGNATURE
 confirm that my signature below indicates that I am authorized to request that EFT payments to be sent to the bank account indicated above.

PRINT NAME _____ TITLE _____
 SIGNATURE _____ DATE SIGNED _____

c) The “packaging” process commences (A “coversheet” must be populated with all payment information to attach to the actual request form and proof of current enrollment from which the payment vendor will ‘pull’ info. Once the package has been assembled, it is forwarded for two levels of DREF approval for payment prior to being submitted to the vendor.

In essence, from the time your request is received to when money arrives at the school (but not yet applied to the student’s account), it takes on average a minimum of three weeks. Of course, this does not take into effect any USPS mail delivery issues or bank issues related to electronic/ACH

payments...let alone the time the school takes to apply the funds to each student's account. And, if the incorrect mailing address was given, the check may end up sitting on the desk in someone's office – that has nothing to do with student accounts - and it never make it to Office of the Bursar. It is necessary to provide some degree of transparency to you of the many steps and parties involved to process a scholarship request so that you have a clearer idea of the timeframe involved to get the funds from the chapter to the school.

- Fundraising Events

When a chapter decides to hold a public event to raise funds. A DREF '[Fundraising Application/Agreement](#)' form must be completed **IN ENTIRETY**²/signed/submitted to DREF. Once received and reviewed, it is forward to DREF's Executive Office for approval. **Until you have been notified that your event has been approved, you are PROHIBITED for advertising/marketing the event, selling tickets – if applicable – to it, as well as soliciting any sponsorships.** When your event is approved, you will be contacted. Also, all event collateral² (ex. Save-The-Date cards, flyers, etc.) must be branded with the DREF logo. This also applies to your sponsorship letter/package. Please forward them to DREF for review and approval prior to distributing to the public.

- Grant Requests

Using DREF terminology, a 'grant request' is asking to be granted access to the money in your fund. It must be used for charitable or educational purposes only (ex. Delta GEMS or EMBODI programming, health-related programming, etc. A DREF '[Individual or Chapter Grant Request](#)' form must be completed/signed/submitted. Your request may be for monies you need to support programs...OR a reimbursement for monies that have already been spent for programming (ex. purchase of school supplies over the summer for 'Back to School" programs). In the case of reimbursements, your request form must be accompanied by digital copies of all receipts. For amounts of \$10,000.00 or more, please include your chapter's bank information on page 2 of the form so that the funds can be sent electronically via ACH. This greatly reduces cases of financial fraud/theft that happens when checks are mailed.

~~²NOTE: There should be no mention of imagery of alcoholic, tobacco nor cannabis products in your promotional materials.~~

- Changing your Chapter Contact Information

Each time your chapter has a change in leadership (due to elections, resignations, etc.), a DREF '[Fund Change Request](#)' form should be submitted immediately. This tells us not only how to contact you but who in the chapter should receive your quarterly fund eReports.

- Grant Reports

:

If your chapter is awarded grant funds – which will remain in your DREF fund until you use the money – the grantor will require some type of reporting at the end of the grant period. That will be detailed in your award notice letter. A copy of the letter should be forwarded to DREF. In addition, DREF requires that you submit a completed/signed DREF [‘Grant Report Fund’](#) form along with a grant report narrative.

- Grant Scholarships

If your chapter receives a grant award from DREF (ex. annual Community Empowerment grant), you are required to complete/sign/submit a DREF [‘Grant/Scholarship Agreement’](#).

- Workplace Giving

If your employer offers matching funds to employees and you would like to donate to your chapter using payroll deduction – and have your donation matched, this can be done by:

1) Signing up to receive a company match for your donation through your company’s HR department. **On their paperwork, you must indicate the name of the chapter that will be the beneficiary of your generosity.** In addition to completing your employer’s paperwork, you must submit a completed/signed DREF [‘Workplace Giving’](#) form. It must be filled out completely, including the section with check boxes for ‘Unrestricted to DREF’, ‘In Honor/Memory of...’ and ‘Restricted to Chapter Educational/Charitable Programs’ [your chapter name MUST be written there].

Purpose:

- | | |
|---|--|
| <input type="checkbox"/> Unrestricted to DREF | <input type="checkbox"/> Restricted to Chapter Educational/Charitable Programs |
| <input type="checkbox"/> In Honor of _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> In Memory of _____ | <input type="checkbox"/> Restricted Other _____ |

At any point that you want to terminate these payroll deductions, please contact DREF Donor Management in writing at chapterengagement@deltafoundation.net

To get to the proper part of the DREF website to access DREF forms or to review the DREF Charitable Engagement Manual, you can find those items [here](#).