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# REFERENCE GUIDE

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## PROGRAM OVERVIEW

- Birdies for Charity presented by TowneBank is a fundraising platform, operating in conjunction with the Dominion Energy Charity Classic, that enables Richmond-area charitable organizations to solicit donations that will be bonused by 10%.
- Birdies for Charity is designed as a platform that can be easily integrated into existing fundraising efforts.
- Participating charities will receive all donations collected on their behalf, minus credit card fees for online donations, plus the additional 10%. There is no minimum amount organizations must generate to receive the bonus.
- There is no monetary cap on donations accepted through the Birdies for Charity program; however, there is a \$10,000 cap on the bonus per participating charity. There is a \$125,000 cap on the total bonus for the entire program that will be met on a first-come, first-served basis.

### **Example #1:**

Charity A raises \$50,000 through the Birdies for Charity program; the bonus program will add \$5,000 to the funds raised, and Charity A's proceeds through the program will be \$55,000 less any credit card processing fees.

### **Example #2:**

Charity B raises \$150,000 through the Birdies for Charity program; the bonus program will add the maximum \$10,000 to the funds raised, and Charity B's proceeds through the program will be \$160,000 less any credit card processing fees.

- This program is operated by PGA TOUR Charities Inc., a 501(c)(3) charitable organization (EIN: 59-2774423).

## BENEFITS FOR PARTICIPATING CHARITIES

- 10% bonus on every donation received through the program (up to \$10,000 bonus per charity).
- Four grounds tickets to each day of tournament play, October 16-18, 2020 (see page 4 for ticket guidelines).
- Exposure via signage at the Dominion Energy Charity Classic.

## HOW TO BECOME A PARTICIPATING CHARITY

- Charitable organizations that are recognized by the Internal Revenue Service as a 501(c)(3) are eligible to participate.
- Interested charities are required to complete the [online application](#), agree to the Terms and Conditions of participation and upload their 501(c)(3) IRS Determination Letter and Form W9.
- PGA TOUR Charities will approve or deny registrations. Charities may begin soliciting donations upon approval.

**Note: Registration for the 2020 program will open at a later date. Returning participants must re-register.**

## **DONATION INFORMATION**

- Participating organizations will solicit donations on their own behalf. The PGA TOUR and Dominion Energy Charity Classic will not solicit for any specific organization.
- One-time flat donations are the only type of donation accepted. There is a minimum donation amount of \$25.00.
- Online donations require a credit or debit card (Mastercard, Visa and American Express are accepted) and are processed immediately. Credit card fees range from 2.5% - 3.5% and vary based on card. The 10% bonus is calculated on the gross amount for online donations.
- Donors who would like to have their gift matched by a corporation must make their gift through Birdies for Charity and complete their company's required paperwork by **June 1**, and the corporate match must be received by **October 18, 2020** to receive a 10% bonus on both gifts.
- Organizations are not responsible for tax-deduction receipts but are encouraged to send gift acknowledgements in a timely fashion upon notification of donation (see page 3 for donor acknowledgment).
- The final day for donations is October 18, 2020. **Donations will not be accepted after October 18, 2020.**

## **HOW TO DONATE**

**Online:** (Mastercard, Visa and American Express are accepted. Credit Card Fees Apply)

1. Visit [deccgolf.com](http://deccgolf.com) and click "Birdies for Charity" under the "Charity" tab, then "Donate Now."
2. Enter the donation amount, choose a participating charity and fill out the billing information form. Donations will be processed immediately and donors will receive a confirmation email that will serve as a gift receipt for tax-deduction purposes.

**Note: Gift charges will show as PGA TOUR Charities, Inc. (Tel: 1-904-285-3700) on credit card statements.**

### **Check:**

1. Make checks out to **PGA TOUR Charities Inc.** and write the designated participating charity/charities in the memo line. (If giving to multiple charities, please designate each charity and gift amount in the memo line or an attached note.)
2. Mail checks to: Dominion Energy Charity Classic, 707 East Main Street, Suite 1025, Richmond, VA 23219, Attn: Birdies for Charity
3. PGA TOUR Charities Inc. will send donors a gift receipt via mail for tax-deduction purposes.

### **Donor Advised Funds at the Community Foundation for a Greater Richmond:**

1. Log into the Donor Connect portal and select **PGA TOUR Charities Inc.** for the grant recommendation.
2. Designate the participating charity/charities in the grant purpose section. (If giving to multiple charities, please designate each charity and gift amount in the purpose section.)
3. Follow the prompts to complete the request. The Community Foundation for a greater Richmond will complete the request by mailing the donation check and grant memorandum to the Dominion Energy Charity Classic.

### **Stock:**

1. Complete the PGA TOUR Charities, Inc. Stock Transfer (DTC) [Instruction Form](#) and initiate the stock transfer.
2. Send the completed form to Community Outreach Coordinator, Kali Edsall, at [kaliedsall@pgatourhq.com](mailto:kaliedsall@pgatourhq.com).

**Note: Gift value and bonus are determined based on market highs and lows and gains or losses experienced.**

### **Required Minimum Distribution from an Individual Retirement Account (IRA):**

**\* Donors aged 70.5 and older can donate funds from their annual required minimum distribution from an IRA account through Birdies for Charity.**

1. Ask IRA Fund Manager to issue a check in the desired amount to **PGA TOUR Charities Inc.**
2. Designate the participating charity in the memo line. (If giving to multiple charities, please designate the charities and gift amount in the memo line or an attached note.)
3. Mail checks to: Dominion Energy Charity Classic, 707 East Main Street, Suite 1025, Richmond, VA 23219, Attn: Birdies for Charity

## **DONOR ACKNOWLEDGEMENT**

- Participating charities have 24/7 access to the online donation portal, thus will be aware of donations made online and are encouraged to send a thank you letter or email, in a timely manner, to continue the direct relationship with the donor.
- When a donation is received via check, donor-advised fund, stock transfer or IRA contribution, Community Outreach Coordinator, Kali Edsall, will notify the charity. Thus, participating charities will be aware of all check contributions and are encouraged to send a thank you letter or email, in a timely manner, to continue the direct relationship with the donor.
- PGA TOUR Charities will send tax receipts for tax deduction purposes.

## **ACCESSING YOUR ONLINE DONOR PORTAL**

- Visit <https://pgatourcharities.org/> to access the online donation portal;
- Click the person symbol in the upper right-hand corner and select "Register;"
- Fill out the form (**Note: you must use the email address associated with your registration for Birdies for Charity**);
- You will receive a code via email to verify your email.
- Login with your new username and password (**Note: you must use your username, not email, when logging back in**).
- Click on "Donors by Charity Report" to view your donor information for online donations. "Anonymous" donations indicate the donor has asked PGA TOUR Charities to not share their information. This report is updated in real time.

## **FUNDS DISTRIBUTION**

- Checks will be mailed in three installments to all participating charities with donated funds.
- Any funds generated between kickoff and June 30, not including the 10% bonus, will be distributed by August 31. Funds generated between July 1 and August 31, not including the 10% bonus, will be distributed by October 31. Funds generated September 1 through the conclusion of the Dominion Energy Charity Classic on October 18, plus the 10% bonus on all funds donated, will be distributed by December 31, 2020. These dates are subject to change.

**Note: Checks will be mailed to the address noted on the organization's W9 attached to their registration form.**

## **BIRDIES PROGRAM AWARDS**

- The 2020 program will award the top participating organization in each of the following categories:

### **Award #1:**

The one participating organization to generate the most funds through the 2020 program will receive one Honorary Observer twosome in the 2021 tournament.

### **Award #2:**

The one participating organization to generate the highest number of donations through the 2020 program will receive four tickets to the Tuckahoe Club hospitality venue at the 2021 tournament.

### **Award #3:**

The one participating organization to receive the first donation through the 2020 program following the launch will receive a Dominion Energy Charity Classic poster autographed by the 2020 champion.

- Prizes are determined by the PGA TOUR and Dominion Energy Charity Classic and are subject to change. For full terms and conditions, please see the [Birdies for Charity presented by TowneBank Toolkit](#).

## **PROGRAM TIMELINE**

### **Late Spring:**

- Registration for the 2020 program opens (charities begin soliciting donations upon approval)

**Note: All interested organizations (new and returning) must register to participate in the 2020 program.**

### **Late Spring —October 18, 2020:**

- Participating organizations solicit donations (see solicitation guide for best practices)

### **June 1, 2020:**

- Deadline for corporate matching gift forms to be submitted

### **June 30, 2020:**

- Cutoff for donations to be included in August 31 distribution

### **August 1, 2020:**

- Signage and Shipping Form due

**Note: The [Signage and Shipping Form](#) pertains to the onsite benefits for participating charities (see page 1).**

### **August 31, 2020:**

- Funds generated between kickoff and June 30 distributed to organizations via mail
- Cutoff for donations to be included in October 31 distribution

### **September 2020:**

- Participating organizations receive four grounds tickets to each day of tournament play in the mail

### **October 16, 2020:**

- Dominion Energy Charity Classic begins

### **October 18, 2020:**

- Final day of tournament and Birdies for Charity program. **Donations will not be accepted after October 18.**

### **October 31, 2020:**

- Funds generated between July 1 and August 31 distributed to organizations via mail

### **December 2020:**

- Winners of the Birdies Program Awards are announced

### **December 31, 2020:**

- Funds generated between September 1 and October 18, plus 10% bonus on all funds generated, distributed to organizations via mail

## PROMOTIONAL MESSAGING & LOGO USAGE GUIDELINES

- The official name of the program is **Birdies for Charity presented by TowneBank**. The first time the program is mentioned in communications, please refer to the name of the program as **Birdies for Charity presented by TowneBank**. Subsequent mentions can be referred to as **Birdies for Charity**.
- The Dominion Energy Charity Classic and PGA TOUR operate the Birdies for Charity program. Please use **Dominion Energy Charity Classic** when referencing the tournament. If you would like to reference the PGA TOUR, please use **PGA TOUR**.
- Participating organizations are encouraged to use the Birdies for Charity presented by TowneBank logo in solicitation efforts. Please email Kali Edsall, Community Outreach Coordinator if you have not received logo files.
- Samples of any materials containing any logo associated with the tournament or program, electronic or hard copy, must be submitted to Kali Edsall, Community Outreach Coordinator, for approval prior to distribution.
- Do not change the colors or fonts used in the logo or place the logo on a busy background; do not add any other graphic elements to the logo.

## TICKET GUIDELINES

- Organizations may use tournament tickets for board members, individuals associated with the organization, giveaways, silent auctions, raffles or as incentives for donors. Organizations may not resell tickets.

## DOMINION ENERGY CHARITY CLASSIC TOURNAMENT INFORMATION

- The Dominion Energy Charity Classic is a PGA TOUR Champions playoff event held at The Country Club of Virginia, James River Course in October.
- The event features the top 72 golfers on PGA TOUR Champions and is the first of three playoff events to determine the Charles Schwab Cup champion.
- The Dominion Energy Charity Classic has helped to give back over \$3.5 million to the Richmond community since the event's inception in 2016.
- The Dominion Energy Charity Classic has been awarded the PGA TOUR Champions Players' Award in 2016, 2017 and 2019 and the PGA TOUR Champions Corporate Partnership Award in 2018.
- Past Champions include Miguel Ángel Jiménez ('19) Woody Austin ('18), Bernhard Langer ('17) and Scott McCarron ('16).

## CONTACT

- Contact Kali Edsall, Community Outreach Coordinator, with any questions at 804-234-8845 or [kaliedsall@pgatourhq.com](mailto:kaliedsall@pgatourhq.com).

## DISCLAIMERS

- Maximum bonus of \$10,000 per group and \$125,000 for the entire program.
- Donations support charitable organizations operating in the Richmond area and are tax deductible to the extent allowed by law. This program is operated by PGA TOUR Charities Inc., a 501(c)(3) charitable organization (EIN: 59-2774423). A copy of the financial statement is available from the Division of Consumer Affairs, Department of Agricultural and Consumer Services, 1100 Bank Street, Richmond, VA 23219 or call 1-804-786-1343. For more information about charitable donations, please [click here](#).
- The PGA TOUR and Dominion Energy Charity Classic will not solicit for any specific organization and will only use donor information for documentation purposes unless donors do not opt out of PGA TOUR Charities communications when donating online.
- All information is subject to change.