



## Serendipity Project

Guidelines for program criteria, services and fees.

The notion of the "Serendipity Project" was first established as a means of fundraising for Board Member-sponsored projects, through the aid of the Marion Institute's 501c3 status. Today we have the ability to offer this same form of sponsorship to projects that we feel dovetail with the Marion Institute's mission statement of "identifying and promoting programs that seek to enhance life for the Earth and its inhabitants." This unique relationship allows us to not only accept tax-deductible gifts on behalf of a particular project, but more importantly, can help strengthen a project's mission.

Depending on the level of service needed, the Marion Institute offers marketing and PR throughout our website, in our Random Gleanings Newsletter and at our annual "Bioneers by the Bay: Connecting for Change" conference which serves as a platform for the promotion of Serendipity Projects to a large public audience.

We believe that the best way to help nurture our Serendipity Projects is to offer options or tiers of support that best match each project's unique circumstances:

### 10% tier

**benefits:**

- 501c3 pass-through service
- annual auditing performed through the Marion Institute
- legal Services [provided at the discretion of the Executive Director]
- accounting report as funds are received
- processing of required tax donation letters for donors
- wire fees not included
- inclusion in the Marion Institute Annual Report
- no website, eNewsletter or other promotion\*

**explanation:**

This first tier level is basically the original framework of responsibilities as outlined in the original concept of the Serendipity Project. The Institute's accounting team spends a great deal of time with regards to the financials for each of the Serendipity Projects. A fee of 10% of donations to projects that select this tier of support would help to offset administrative costs.

\*The Marion Institute reserves the right to promote each of the Serendipity Projects when and where it feels it may be beneficial to the overall good of the organization and our programs.

## 15% tier

### **benefits:**

501c3 pass-through service  
annual auditing performed through the Marion Institute  
legal Services [provided at the discretion of the Executive Director]  
accounting report as funds are received, as-need reporting  
processing of required tax donation letters for donors  
wire fees included  
Serendipity Project page on the website  
dedicated donation page on the website  
inclusion in Random Gleanings [at least once per year]  
inclusion in the Quarterly Mailer [at least once per year]  
inclusion in the Marion Institute Annual Report  
press releases [at least once per year]

### **explanation:**

Serendipity Projects that seek additional help in terms of online donations, dialogue with our members, website visitors and eNewsletter recipients, an online presence, PR and additional promotion could select this enhanced tier of support. We would also waive wire transfers from the accounting portion of this support tier.

## Criteria.

New criteria that calls for initial and ongoing evaluation of the fiscal support for – and outcomes of – each of our Serendipity Projects is needed in order for us to create and nurture a sustainable and vibrant array of models of deep and positive change.

### **criteria:**

sponsorship by member of the Board  
approval by a majority of the Board  
initial deposit of \$5,000  
minimum of \$2,500 in support/year  
signed agreement with a proposed budget and any other supporting documents  
annual financial and narrative report from project leader  
annual approval of renewal by the Board

\*Please note that all approved projects of the Marion Institute are required to include the MI logo on the home page of their project website, if a project website exists, with a live link to the MI website and state that you are a “project of the Marion Institute” (we will provide a high resolution copy of our logo). We want to make sure that our website is being used to its fullest potential as a resource for information and fundraising.

If interested in learning more, please contact Desa Van Laarhoven,  
Executive Director at [desa@marioninstitute.org](mailto:desa@marioninstitute.org) or call 508-748-0816.