



# THIRD-PARTY FUNDRAISING TOOLKIT

2020

## OUR MISSION

The mission of the 525 Foundation is to educate and empower individuals to make positive choices related to drug and alcohol use.

## **Third Party Fundraising Event Guidelines**

525 Foundation Inc. is extremely grateful to the many people and organizations who wish to organize events to support our mission. Your generous efforts and support will help promote our primary prevention efforts. Only those third-party events which fall in line with our mission will be considered for approval.

Each event will be considered on a case-by-case basis.

### **Definitions**

*Third-Party Fundraising Event*- is a fundraising activity by a non-affiliated group or individual, where the 525 Foundation Inc. has no fiduciary responsibilities and little or no staff involvement.

*Event Organizer*- Person, group, organization, or business hosting a third-party fundraising event to benefit 525 Foundation.

### **Fundraising Ideas**

Event fundraiser options are endless, from concerts to barbeques, garage sales, car washes or happy hours. We encourage you to be creative and personalize your fundraiser to what works best for you.

#### **Birthdays and Celebrations**

Ask friends and family to donate to 525 Foundation instead of giving gifts.

#### **Workplace Campaigns**

Payroll deductions, casual dress Fridays. Ask your employer if they match your donations.

#### **Tournaments**

Basketball, golf, volleyball, board games, and more! Set up a tournament of your choice to raise money for 525 Foundation.

#### **Store Sales or Ticket Proceeds**

Love shopping for a cause? Donate a percentage of store sales or event ticket sales to 525 Foundation, to make every purchase go even further.

#### **School Events**

Talk to your school about donating a portion of ticket proceeds from sporting events or theatre productions to 525 Foundation.

## **Event Application and Approval**

Please review these third-party Fundraising Guidelines. After reviewing these guidelines, please complete and submit for approval the attached Fundraising Event Proposal Form and return it to the address on the Third-Party Fundraising Event Proposal.

- Approval by 525 Foundation must be obtained before you advertise or hold your event.
- Annual events should be registered with 525 Foundation each year.
- 525 Foundation reserves the right to refuse funds raised at unapproved events and activities.

## **Marketing and Promotion**

- Third-party events may not be represented as events sponsored by 525 Foundation.
- Promotions for the event should reflect 525 Foundation as a beneficiary, and not conduction the event (i.e. "proceeds from XYZ Golf Tournament will benefit 525 Foundation")
- All promotional materials related to an event benefiting 525 Foundation must be reviewed and approved by the Events or Communications Manager prior to distribution (e.g. flyers, press releases, tickets, brochures, posters, etc.).

## **Event Expenses**

- If you must buy goods or services for the event and expenses will be incurred, please consider the following
  - Expenses incurred for conducting the event are the responsibility of the hosting volunteers and the organizer of the event.
  - 525 Foundation will not be liable for any costs or expenses.
- 525 Foundation will not reimburse organizer for the purchase of goods for a third-party event. No goods may be charged to 525 Foundation for any reason.
- Suggestions to reduce event expenses:
  - Secure donated goods and services.
  - Negotiate reduced costs.

## **Event Income**

- The event organizers are responsible for maintaining accounting for the event.
- All donation checks must be payable directly to 525 Foundation.
- Only checks payable to 525 Foundation, and cash donations clearly labeled with the donor's information, will be provided with a tax-deductible acknowledgement letter in accordance with IRS and state tax regulations.

- Donations made out to an organizer or other source may be sent a general acknowledgement letter with no value attached.
- If you are deducting expenses before sending net proceeds to 525 Foundation, you should not state or imply to your donors that any funds given to you are tax deductible, and you should not use the word “donation” because it implies that they are tax deductible.
- Sponsor agrees to inform 525 Foundation of any effort to recruit major financial underwriters to ensure there is not duplication of underwriting efforts already underway.
- **Within 30 days following the event** organizers should submit funds, payable to 525 Foundation, and appropriate documentation from individuals and/or businesses regarding their financial donations.
- The anticipated amount or the percentage of monies raised that will benefit 525 Foundation must be clearly stated in all pre- and post-fundraising advertising or announcements so donors can realize what percentage of their donations will directly benefit 525 Foundation’s mission.
- A minimum of fifty-percent (50%) of the gross proceeds of the event must be donated to 525 Foundation. A financial report must be presented with the proceeds within **thirty (30) days** of the event’s conclusion via online, email, or delivery to 525 Foundation administrative office.
- Credit card donations can be made online through 525 Foundation’s online donation page.
- **A donation solicited on 525 Foundation behalf, whether the donation is monetary or \*in-kind, is tax-deductible only when it is made directly and entirely to 525 Foundation.** \*An in-kind donation is a donation of goods, materials, skills, or labor.

### **Event Insurance and Liability**

- The event organizers are responsible for obtaining any necessary permits and clearances required by local and state government and complying with all applicable laws and obtain appropriate insurance coverage if necessary.
- 525 Foundation Inc. cannot be held liable for details associated directly or indirectly with the event, including, but not limited to: expenses, purchases, insurance, or liability coverage.
- The third-party responsible for the event intended to benefit 525 Foundation must agree to indemnify and hold 525 Foundation blameless for any and all risk and claims that may arise as a result of the event.

## **How can 525 Foundation help with your event?**

525 Foundation is extremely appreciative of the organizers who manage third-party events to benefit its programs but is limited in the amount of assistance it can provide a third-party event.

### **525 Foundation can provide the following:**

- Advice and suggestions on event planning, as time allows.
- Approval of the use of 525 Foundation name, logo, and images\*.
- Provide promotional materials when available
- 525 Foundation Event Banners.
- Promotion of your event, when appropriate, to the 525 Foundation community through regular advertising venues such as our website, social media, and internal communications.
- Acknowledge and provide tax receipts for contributions made payable and submitted to 525 Foundation.

\*Approval of event marketing materials where 525 Foundation name, logo or images are utilized is not optional.

\*\*Event Banner will be provided depending on availability.

### **525 Foundation is UNABLE to provide the following:**

- Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees, and collection monies.
- 525 Foundation's tax-exemption number for making any purchases related to your event.
- Guaranteed volunteer, Board Member, or staff attendance at the event.
- Access to donor lists or contacts.
- Responsibility of any nature or kind associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance, or liability coverage.

Thank you for your support of the 525 Foundation and its mission to promote primary prevention! Together we CAN!! We hope that your event is a great success!

**AGREEMENT**

With my signature below, I certify that I have read and understand the rules and policies for conducting a third-party sponsor event or activity. I assure that 525 Foundation’s name and associated logos will be properly used, funds will be handled and accounted for in a responsible manner, fundraising will be conducted in a method that is consistent with the public image of 525 Foundation and that those associated with the event or activity will act in accordance with all municipal, state, and federal laws. I understand that at any time 525 Foundation can withdraw its consent for the event or activity at any time and for any reason.

\_\_\_\_\_

\_\_\_\_\_

Signature of Contact Person/Responsible Party

Event Date

Print Name: \_\_\_\_\_

Print Name of Organization: \_\_\_\_\_

**Please keep a copy of the policy and completed application for your records.**

## Third-Party Fundraising Proposal Form

This form serves as a branding agreement between the Sponsor and 525 Foundation for the purpose of setting forth the terms and conditions of our relationship in respect to the fundraising event described below. **Please return this form to 525 Foundation for event approval four (4) weeks prior to scheduled event.**

Contact Name: \_\_\_\_\_

Organization Name: Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Event Information Name of Event: \_\_\_\_\_

Event Date(s): \_\_\_\_\_

Event Time(s): \_\_\_\_\_

Event Location: \_\_\_\_\_

Estimated financial donation to be raised for 525 Foundation Inc: \_\_\_\_\_

Estimated number of event participants and attendees: \_\_\_\_\_

Please describe your fundraising event or activity including all parties involved with the event.

---

---

---

---

---

---

---

---