



HOPE ALLIANCE
Third Party Fundraisers

Thank you for your interest in hosting an event to benefit Hope Alliance. We hope that these guidelines provide you with helpful information on how to make your event a success while also meeting our requirements for fundraising activities.

By taking on a third-party project, you assume the responsibility of creating an event with minimal assistance from Hope Alliance. Please note that because we cannot schedule, budget nor predict a reliable source of revenue from third party events, Hope Alliance reserves our resources for our own special events and fundraising efforts.

Fundraisers benefiting Hope Alliance should be run by organizations or individuals that are financially responsible, of well-established reputation and motivated by a genuine desire to help Hope Alliance pursue its mission. If an outside business or person wishes to sponsor a special event or promotional campaign to benefit Hope Alliance the following guidelines must be followed.

For more information, or to begin planning a third party fundraiser, please contact John Duck, development director, at john.duck@hopealliancetxt.org or 512-255-1212.

- The first step in organizing an event to benefit Hope Alliance is to meet with the development director to discuss event specifics and feasibility. The development director will seek approval from the CEO before any action is taken on the event/campaign.
- If approved, Hope Alliance and the host organization will sign a Third Party Fundraiser Planning Agreement outlining the details and commitment of the event. This will include the terms of the event including donations, solicitations and promotions.
- Any expenses for the event must be incurred by the host organization, unless otherwise approved by the CEO and development director.
- Organizers must identify any businesses or individuals to be contacted for solicitation so that Hope Alliance can avoid duplicated efforts. Please seek approval from Hope Alliance before soliciting support or accepting support from other organizations to prevent duplication of efforts and conflicts with other events that might be in the planning process.
- A donation solicited on Hope Alliance's behalf, whether the donation is an item or cash, is fully tax-deductible only when it is made directly and entirely to this agency. Hope Alliance will determine what types of gifts can be considered tax-deductible prior to solicitation or promotion, as it is the only agent that can verify that such a gift was made, and its nature, to the Internal Revenue Service. This information must be made explicitly clear in event promotions.

- Hope Alliance will issue donation forms only for in-kind or financial support that has been documented. All donation forms/letters must be generated by Hope Alliance staff.
- Any forms requiring financial information, Tax ID #, Nonprofit Exemption Letter, etc. must be completed and submitted by Hope Alliance staff.
- Any promotion of the event/campaign that mentions or includes Hope Alliance's name or logo must be approved by the development director prior to printing or release.
- Hope Alliance staff will make every attempt to attend third party events. If specific staff are needed on-site, this should be outlined in the planning agreement. However, Hope Alliance cannot guarantee the presence of volunteers or staff for any third-party fundraising event.
- In general, we ask that no more than 20 percent of gross revenue be used to cover expenses.
- Any contact with media must be coordinated with Hope Alliance.
- Hope Alliance will not solicit participation from our clients beyond notifying them of the event details and inviting them to attend when appropriate.
- A complete report of the event and donations/funds must be submitted to Hope Alliance within 10 business days of the event.
- All forms should be submitted to John Duck, development director, by email to john.duck@hopealliancetx.org or by fax to 512-255-7331.



Hope Alliance
Third Party Fundraiser Planning Agreement

Please complete, sign, and return this page form to John Duck, development director, at john.duck@hopealliancetxt.org or by fax to 512-255-7331.

Hope Alliance understands that some of this information will be unknown or preliminary during the planning phase. Please update us as details are finalized. It is important that we be contacted before any requests are made on the agency's behalf.

Event Name: _____ **Event Date:** _____

Host Organization: _____

Address: _____

Contact Name: _____

Phone: _____ **Fax:** _____

E-mail: _____

Event Summary: _____

Event Location: _____ **Event Time:** _____

Anticipated Attendance: _____ **Cost to Attend:** _____

Goods/Benefits Received by Guests: _____

Tax Deductible Amount for Guests: _____

Marketing Plans: _____

Use of name or logo (printed, e-mail, web, signage, etc). Where and how will Hope Alliance be mentioned?: _____

Solicitation/Sponsorship Plans *(Please include any entities that will be approached for sponsorship along with their full contact information:*

Anticipated Expenses *(Please outline the anticipated cost of the event, noting any items for which Hope Alliance has agreed to pay.)*

Anticipated Gross Revenue: _____

Anticipated Net Revenue: _____

Additional Information: _____

Signatures

Representative of Host Organization

Date

Hope Alliance Development Director

Date

Hope Alliance CEO

Date



Hope Alliance
Post Event Follow-Up

Please complete this with John Duck, development director, after the event has been completed.

Event Name: _____ **Event Date:** _____

Host Organization: _____

Net Revenue: _____ **Event Attendance:** _____

Gross Revenue: _____ **Expenses:** _____

Key Relationships Developed: _____

Sponsorships/Donations: _____

Follow-Ups Needed: _____

Key Expenses: _____

Additional Information: _____

**Please attach a mailing list of attendees.*