

Third-Party Events



The Scleroderma Foundation receives numerous inquiries each year from individuals and organizations that want to stage fundraising events in support of our mission. These “third-party” events are run independently from chapters or the national office by interested volunteers.

The path to launching a third-party event typically begins with an idea and plan of action that is presented to a chapter or the national office. Upon careful review, the Foundation assists the potential organizers in examining a variety of factors to determine if, in fact, the proposed event is viable. If the event is to be held within a designated chapter territory, third-party event organizers will be encouraged to work with that chapter. If the chapter declines the opportunity, or the event will be held in an area that is not part of a chapter territory, the event planners will work directly with the national office.

Examples of successfully produced and staged events include golf tournaments, run/walk events, raffles, auctions, wine tastings, company dress-down days, bowl-a-thons, motorcycle rides, and various other events. Volunteer creativity is the only limitation! We encourage the development of these ideas and, if the event is accepted, assistance may be provided in certain areas of preparation and coordination and provision of a nominal level of guidance and resources when appropriate.

Not only are the funds raised from these events used to support programs and services benefiting scleroderma patients and their families, they also assist in the ongoing funding of critical scleroderma research initiatives. Furthermore, third-party events help to increase awareness of scleroderma and the Scleroderma Foundation, a critical component in the fight against this disease.

Please review our guidelines for creating and staging a third-party event on behalf of the Scleroderma Foundation. You will also be required to fill out an event application.

For more information or an application, please contact your local chapter president (find phone and e-mail information at www.scleroderma.org) or contact Tracey Sperry, Development & Grant Manager, at (800) 722.4673, ext. 44 or tsperry@scleroderma.org.

THIRD PARTY EVENT POLICY

The Scleroderma Foundation (SF) defines a “Third Party Event” as any fundraising activity by a non-affiliated group or individual, in which SF has no fiduciary responsibilities and little or no staff involvement.

Such events include:

1. Non-Affiliated Event - This type of event connects SF with an existing event, activity or program, and a portion or all of the proceeds are donated to the national office of the Scleroderma Foundation or the designated Foundation chapter in which the event is being held.
2. Special Interest Even - This is the organization of a new and independent event specifically designed to raise funds for SF, with all net proceeds going to benefit the national office of the Scleroderma Foundation or the designated Foundation chapter in which the event is being held..

The Scleroderma Foundation is extremely grateful to the many individuals and groups who wish to organize events to support the work and mission of organization. However, only those “Third Party Events” that meet specific criteria, and legitimately and genuinely benefit SF, will be considered for endorsement. Each event will be reviewed on a case-by-case basis.

THIRD PARTY EVENT POLICY GUIDELINES

The following are the approved guidelines for “Third Party Events.”

Guidelines must be agreed upon by both the outside party and SF.

An event application must be submitted for review and approved before initiation of the event takes place. Approval will be granted from the appropriate chapter or the national office.

Please complete and submit the signed policy and application form.

PROMOTION

The event will be promoted and conducted in a manner to avoid statement or appearance of SF endorsing any product, firm, organization, individual or service.

SF reserves the right to decline any underwriting and/or sponsorship when it believes that the association may have a negative effect on the credibility of the Foundation.

All “Third Party Events” should establish a timetable and an action plan at least three months before the event. An SF staff person should be contacted to aid in the development of committee structure, marketing and deadlines, if applicable.

The official logo of the Scleroderma Foundation should be appropriately used in conjunction with such an event, but may not be altered in typeface, color, configuration and/or position. Any use of the SF logo must adhere to established graphic standards.

SF must review and approve all promotional materials including, but not limited to, advertising, letters, brochures, flyers and press releases prior to production or distribution.

Promotional materials and/or advertisements cannot be purchased with SF funds. Any such advertisement should be the result of underwriting or sponsorship related to the event.

SF reserves the right to participate in similar promotions and other “Third Party Events.”

SF reserves the right to decline endorsement of an event if other non-profit organizations are beneficiaries and/or involved in the event without mutual compliance.

The event promotion and fundraising should remain within the participating chapter’s territory. When more than one chapter is involved, the agreement must be made with each chapter. Areas outside chapter territories must be managed through the Foundation’s national office.

LIABILITY

The Scleroderma Foundation is not financially liable for the promotion and/or staging of a “Third Party Event.”

“Third Party Event” organizers will have participants complete a waiver for release from liability when requested by SF.

“Third Party Events” organizers will provide insurance certificates.

REVENUE GENERATION

For Special Interest Events, 100% net (minus campaign expenses) income must be remitted to SF.

Funds must be given to the local chapter or, where no chapter exists, must be given to the national office. Support Groups cannot receive or retain fundraising income.

For Non-Affiliated Events, a minimum of 50% gross income should be remitted to SF. However, exceptions may be made depending on the magnitude of the event, or other factors determined to genuinely benefit SF through its endorsement.

All promotional materials must clearly state the percentage of proceeds and/or the portion of the ticket price that will benefit SF.

SF must receive all net proceeds within 30 working days of the conclusion of the event and/or promotion.

SF cannot endorse or be affiliated with any events that are for the benefit of a specific person or SF member.

RECORDS

SF should receive a list of targeted sponsors for the event, *before they are approached*, to minimize overlap with other fundraising campaigns underway by the Foundation.

SF should receive a complete accounting of all funds collected and expenses related to the event. SF reserves the right to inspect all event financial records.

SF will receive a list of all tangible non-cash contributions to the events.

SF will receive a list of all donors who contributed to the event.

“Third Party Event” organizers will collect names of participants, sponsors and volunteers, mailing appropriate materials as needed.

Organizers may coordinate with SF for assistance.

ACCESSIBILITY

All “Third Party Events” should be accessible to people with disabilities. The event should take place at a location that meets ADA regulations. “Third Party Event” organizers should promote and make arrangements for any special accommodation needs by participants, volunteers, and/or staff.

TAX ISSUES

According to Section 170 of the Internal Revenue Code, the general rule is: *“There shall be allowed as a deduction any charitable contribution (as defined in subsection (c)) payment of which is made within the taxable year.”* Subsection (c) goes on to define the term “charitable contribution” as meaning a gift to or for the use of qualified organizations. To become a qualified organization, most organizations must apply to, and be approved by, the IRS. If a payment is made to an organization that is a qualified organization, the payment is a charitable contribution.

ORGANIZATIONAL ISSUES

The Scleroderma Foundation has applied to and been approved by the IRS as a charitable (qualified) organization as defined by Internal Revenue Code Section 501 (c)(3) meaning that contributions to the Foundation qualify for the maximum charitable contribution deduction under the Internal Revenue Code. Chapters have been reported to the IRS as part of the Foundation and, thus, are also charitable organizations that qualify

for the maximum charitable contribution deduction. If chapters establish branches or auxiliaries that are part of the chapter and controlled by the chapter, they also qualify on the basis that they are part of an already existing qualified organization.

PRACTICAL ISSUES

A difficulty arises when an independent, outside organization wishes to raise money for the Foundation. If the payments are made to this independent organization and it is not a qualified organization, tax deduction rules do not apply; if payments are payable to the Foundation, then they qualify to the extent allowed by law.

After you have read the above policy thoroughly, please fill out the "Third Party Event" Application and sign and date this agreement below. Mark any mutually agreed upon changes to the above with initials.

THE ABOVE GUIDELINES HAVE BEEN READ AND AGREED TO BY:

Contact Name: _____ Date: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

Organization/Affiliation: _____

SF Representative: _____ Date: _____

Please send completed application and signed agreement to the local SF Chapter or to Tracey Sperry, Development & Grant Manager, Scleroderma Foundation, 300 Rosewood Dr., Ste. 105, Danvers, MA 01970 Phone: 800-722.HOPE (4673) Fax: 978-463.5809

