



## 3<sup>rd</sup> Party Fundraising

Thank you for selecting the Jaime's LILAC Foundation as the beneficiary of your fundraising event or activity (mutually referred to as 'event'). We rely on individuals and organizations that generously initiate such events. We are honored you have selected us, and we are grateful for your efforts.

This packet contains the following information:

1. **Fundraising Protocols:** The Jaime's LILAC Foundation has established certain protocols for those seeking to plan events to benefit the Foundation. Please review these policies and guidelines carefully. Upon written approval of your proposal by the Foundation, the protocols become part of your agreement with the Foundation and you will be responsible for compliance.
2. **Fundraising Agreement:** If you or your organization would like to host an event to benefit the Jaime's LILAC Foundation, please complete the *3rd Party Fundraising Agreement* and wait to hear from us that you have our approval prior to making plans for your event. We will generally provide approval within [one (1)] month after you have provided us with the *3rd Party Fundraising Agreement*. The Agreement should be completed and signed by an authorized representative of your organization. For individual sponsored events, the primary individual should complete and sign as the authorized representative.
3. **Financial Summary:** Please complete the *3rd Party Fundraising Financial Summary* form and return it to the Jaime's LILAC Foundation as soon as possible following the event.

As a final note, although we actively encourage third-party fundraising, we must approve in writing all events in advance as well as any support materials (print, electronic, etc.) that will include the Foundation's brand.

We appreciate your interest in fundraising for the Jaime's LILAC Foundation, and we look forward to working with you. If you have any questions, please contact:

[Contact@jaimeslilac.org](mailto:Contact@jaimeslilac.org)

## Publicity

If the Jaime's LILAC Foundation brand is to be used in publicity and marketing materials, the Foundation must approve in writing any layout and design incorporating the logo prior to production and release.

The full name of the Foundation is the 'Jaime's LILAC Foundation' and the Foundation should be identified by its full name in first reference in all materials pertaining to the event. The term 'Foundation' (capitalized) may be used sparingly after the first reference. Please do not use any other interpretation or variance of the Foundation name.

- The Jaime's LILAC Foundation may only be identified as the beneficiary of your event. For example, you should not call an event "The Jaime's LILAC Foundation Benefit Dinner." Rather, the event should be promoted as the "Dinner to Benefit the Jaime's LILAC Foundation".
- Promotions for event must reflect the Jaime's LILAC Foundation as the beneficiary, and not the host, presenter, or sponsor (for example, "proceeds from this event will benefit the Jaime's LILAC Foundation").
- All promotional and support material must be clearly marked to make clear that the event is being held to benefit the Jaime's LILAC Foundation.
- Use of the Jaime's LILAC Foundation logo on any promotional materials including, but not limited to, advertising (electronic and print), letters, brochures, flyers, and press releases, must be approved in writing by the Foundation. Please do not make public announcements or promote the event until you receive written approval from the Foundation of your fundraising proposal.
- Creation of websites, social media pages, or the like with 'Jaime's LILAC Foundation' or anything similar is not permitted.
- If the event is having a featured speaker, MC, performers, etc., the Foundation must review and approve any such persons.

## **Event Approval and Foundation Assistance**

Approval for the event is specific to the dates you indicate on the *3<sup>rd</sup> Party Fundraising Agreement*. If you intend to repeat the event, you must submit a new request.

While we will do our very best to provide representatives if you request them, we cannot guarantee attendance of staff or volunteers at the event. If you would like to request a speaker or representative for an event, please provide the details on the *3<sup>rd</sup> Party Fundraising Agreement*.

As requested and appropriate, the Foundation will provide brochures, pamphlets, and other informational materials, promoting and explaining the Jaime's LILAC Foundation. Please let us know your needs in this area as soon as possible so we can make sure we have sufficient quantities for your event.

The Foundation is unable to provide its donor mailing lists to third-party fundraisers. Event organizers should have their own list of potential contributors or participants. As appropriate and approved, we will include your event in the Foundation's electronic media outlets.

## **Event Insurance**

If appropriate, event organizers must obtain their own liability insurance to cover the event and add the 'Jaime's LILAC Foundation, Inc.' as an additional insured to their insurance policy.. If a liquor license is required, it is the responsibility of the event organizers to obtain the license.

## **Solicitation of Corporate Donations, Sponsorships, and In-Kind Donations**

In order to better coordinate fundraising events, we ask that you provide us with a list of targeted sponsors for your event before they are approached. Please remember that anyone who already supports the Foundation may not wish to make additional donations.

## **Event Expenses and Income**

If you must buy goods for the event, or if expenses will be incurred, please consider the following:

- Determine whether or not the event will generate enough income to reimburse you for the expenses.
- The Jaime's LILAC Foundation will not reimburse you for the purchase of goods and services for your event.

- The event planner/host may not take a fee, commission, or salary relating to the event.

Because the Jaime's LILAC Foundation is not sponsoring your event, we cannot have event revenues and expenses managed by the Foundation. Only the net amount (final net proceeds) should be provided to the Foundation.

Please note the following relating to your event:

- You cannot set up financial accounts in the name of the Jaime's LILAC Foundation.
- Checks made payable to the Jaime's LILAC Foundation must be sent to the Foundation for processing.
- As a fundraiser being promoted as benefitting the Jaime's LILAC Foundation, all proceeds (net revenue), after deducting expenses, must be sent to the Foundation promptly after the event.
- Checks made payable to the Jaime's LILAC Foundation will be provided with a tax deductible acknowledgement letter. If cash donations are taken and donors request an acknowledgement of their gift for tax purposes, the following legible information must be collected and reconciled with the proceeds given to the Foundation: name, address, amount given, and date given. Collection of information is the sole responsibility of the event organizers.
- If you are deducting expenses before sending net proceeds to the Foundation, you may not state or imply to your donors that any funds given to you are tax-deductible. A donation solicited on our behalf is fully tax-deductible only when it is made directly and entirely to the Jaime's LILAC Foundation.

If you and we agree that the event is best to be held and processed by the Foundation, the following additional points are agreed to by the event organizers. These same protocols will be deemed to be part of the *3<sup>rd</sup> Party Fundraising Agreement*. Any additional and/or modified protocols will be included in the approval letter from the Foundation.

- The Foundation must have a minimum of [three (3)] months notification of the event to ensure appropriate planning.
- A budget must be presented by the event organizer and approved by us.
- All expenses must be appropriately forwarded to the Foundation contact in a mutually agreed timely manner.

- All revenues must be appropriately forwarded to the Foundation in a timely manner through agreed-upon mechanisms (i.e.: on-line donation portal, U.S. mail, etc.).
- As appropriate and mutually agreed, additional and/or modified protocols may be required.



## Jaime's LILAC Foundation 3<sup>rd</sup> Party Fundraising Agreement

Please complete this form for consideration of your event. Questions should be directed to the Foundation to **[name]** at **[number]** or **[e-mail]**.

### Responsible Party Sponsoring Event (signatory of agreement)

Name of Sponsoring Organization or Individual \_\_\_\_\_  
Individual Name / Title (if not individual above) \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Telephone (\_\_\_\_\_) \_\_\_\_\_ Mobile (\_\_\_\_\_) \_\_\_\_\_  
E-Mail \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_  
Website \_\_\_\_\_

### Primary Contact for Event (if different than above)

Individual Name / Title \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Telephone (\_\_\_\_\_) \_\_\_\_\_ Mobile (\_\_\_\_\_) \_\_\_\_\_  
E-Mail \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

### Event Description

Event Name \_\_\_\_\_  
Description of event including any fees charged for admission or goods and services.  
\_\_\_\_\_  
\_\_\_\_\_

Inclusive Dates \_\_\_\_\_ Location(s) \_\_\_\_\_  
Start Time \_\_\_\_\_ End Time \_\_\_\_\_  
Address of Event \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Expected Number of Participants/Patrons: \_\_\_\_\_  
Do you have a committee? Yes  No  (Please attach committee list)

How do you plan to use the Jaime's LILAC Foundation name and/or logo? (solicitation letters, invitations, flyers, press releases, website, etc.)

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*NOTE: The Jaime's LILAC Foundation must approve all support materials prior to production and use. Please see the Jaime's LILAC Foundation 3rd Party Fundraising Protocols for additional information.*

What is your plan for promoting/advertising the event?

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Names of featured speakers, MC, performers, etc.

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### **Jaime's LILAC Foundation Support**

Foundation representatives at event? Yes  No  If yes, how many hours? \_\_\_\_\_

*Please note that we cannot guarantee Foundation representatives.*

Describe the activities requested of Foundation representatives.

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Public Speaker? Yes  No  Please provide details.

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Would Jaime's LILAC Foundation brochures be useful to your event?

Yes  No  If yes, please indicate quantity \_\_\_\_\_

Would you like the event listed on Jaime's LILAC Foundation's website and social media pages?

Yes  No

Additional information the Foundation should know regarding your event or other requests?

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## Financial

Will the proceeds from your event be donated solely to the Jaime's LILAC Foundation?  
Yes  No  If no, what other charities are involved and what is the allocation percentage?

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Projected Gross Revenue \_\_\_\_\_

Projected Expenses \_\_\_\_\_

How will funds be raised?

Pledges  Auction  Ticket Sales  Donations

Other  (please explain)

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Are you approaching sponsors for the event? Yes  No

If yes, please list individuals and organizations to be solicited.

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## Acknowledgement

*Responsible party must initial each of the nine following acknowledgements.*

\_\_\_\_\_ I have read and agree to comply with the Jaime's LILAC Foundation *3<sup>rd</sup> Party Fundraising Protocols*. I understand that the Protocols are a part of this Agreement. I also understand that any additional protocols included in the Foundation Approval Letter become a part of this Agreement.

\_\_\_\_\_ I understand that this is a proposal and I may not execute the event without the prior written approval of the Jaime's LILAC Foundation.

\_\_\_\_\_ I understand that publicity and other marketing materials for the event must be approved by the Jaime's LILAC Foundation prior to being produced and released.

\_\_\_\_\_ I understand that I am being granted permission to use the Jaime's LILAC Foundation logo (brand) and will not distort the graphics or display in an inappropriate, unapproved manner.

\_\_\_\_\_ I understand that any featured speakers, MC, performers, etc. must be reviewed and approved by the Jaime's LILAC Foundation.

\_\_\_\_\_ I have read and understand that I must return the *3<sup>rd</sup> Party Fundraising Financial Summary* form to the Jaime's LILAC Foundation promptly after the event.

\_\_\_\_\_ I agree to indemnify and hold harmless the Jaime's LILAC Foundation, its directors, employees, and legal representatives, for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any term or provision of the Jaime's LILAC Foundation. Furthermore, I understand Jaime's LILAC Foundation insurance will not cover *3<sup>rd</sup>* party events nor will the Foundation be listed as a coinsured on any co-existing event.

## Signatory of Agreement

I have carefully read and fully understand the Jaime's LILAC Foundation 3<sup>rd</sup> Party Fundraising Protocols and Agreement. I am aware a letter of approval must be issued by the Jaime's LILAC Foundation prior to conducting this event, and I am aware the initial event submission review usually takes up to one (1) month.

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**Signature** (for electronic submission, your typed full name on this line serves as your signature)

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**Printed Name**

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**Title**

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**Organization Name**

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**Date**

On behalf of everyone the Jaime's LILAC Foundation serves, our staff and Board of Directors wish to thank you once again for reaching out to us and helping us achieve our mission. We cannot possibly provide the Naval Special Warfare community all that is needed without your generous support.

Please return the completed packet by one of the following twp methods:

Email: [contact@jaimeslilac.org](mailto:contact@jaimeslilac.org)

Mail: Jaime's LILAC Foundation  
ATTN: 3<sup>rd</sup> Party Fundraising Processing  
PO Box 140890  
Staten Island NY 10314

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For Office Use Only

Date Reviewed \_\_\_\_\_ Approved  Not Approved

By \_\_\_\_\_ 30 day tickler date \_\_\_\_\_

**Jaime's LILAC Foundation**  
**3<sup>rd</sup> Party Fundraising Financial Summary**

Please complete within thirty (30) days of the close of your event and forward as indicated below.

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**3<sup>rd</sup> Party Fundraising Event Name**

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**3<sup>rd</sup> Party Fundraising Primary Contact**

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**Date of 3<sup>rd</sup> Party Fundraiser**

**Income \$** \_\_\_\_\_

**Expenses \$** \_\_\_\_\_

**Net Income (Proceeds) \$** \_\_\_\_\_

Please mail the proceeds from your event along with this form and any other support documentation for proper donor acknowledgement within thirty (30) days following the close of the event to:

Jaime's LILAC Foundation  
ATTN: 3<sup>rd</sup> Party Fundraising Processing  
PO Box 140890  
Staten Island NY 10314

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Please make checks payable to 'Jaime's LILAC Foundation'

[www.jaimeslilac.org](http://www.jaimeslilac.org)

Phone: (347)201 - 9845