



# LAKESHORE

## Lakeshore Foundation's Third Party Fundraising Policy

Thank you for your interest in hosting an event, promotion or drive to benefit Lakeshore Foundation. The support of dedicated community members, businesses, schools, churches and other groups plays a significant role in Lakeshore's ability to provide programs for individuals with physical disabilities and chronic health conditions, injured service men and women and their families, and Olympic and Paralympic athletes and hopefuls.

Lakeshore is grateful for your fundraising efforts and values your dedication to our work. In that spirit, we must ensure compliance with best practices. Therefore, all Third Party Fundraisers must be approved by Lakeshore in advance.

Lakeshore's intention is to ensure that your event is a success. The policy that follows will provide guidelines and answers to frequently asked questions.

We will contact you within 10 days of receiving your application. If the event is approved, Lakeshore will provide you with a Letter of Authorization which will validate the authenticity of your event.

If you have ideas or needs that are not addressed in this policy, please contact us and we will do our best to provide assistance. It is important to note that Lakeshore cannot guarantee all requests can be accommodated.

### ***LAKESHORE FOUNDATION'S MISSION STATEMENT:***

Our mission is to enable people with physical disability and chronic health conditions to lead healthy, active, and independent lifestyles through physical activity, sport, recreation, advocacy, policy, and research.



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### ***How We Can Help:***

- ◇ Provide Lakeshore's logo and name upon approval of event
- ◇ Assist with promotion of event including social media and inclusion in the Lakeshore newsletter
- ◇ Event appearance by a Lakeshore Staff Member who can give a presentation, receive proceeds or thank the group; such appearances must be scheduled in advance
- ◇ Provide written tax receipts for donors who make checks payable to Lakeshore Foundation
- ◇ Supply informational brochures, fact sheets, posters, pictures or banners about Lakeshore's programs
- ◇ Upon approval of an event or partnership, Lakeshore will provide a Letter of Authorization to validate the authenticity of the event; this letter may be provided to event participants and/or vendors whose support is being solicited as proof of the established partnership

### ***Lakeshore is Unable to Provide:***

- ◇ Staff resources to assist in event planning or running of the event
- ◇ Mailing lists of corporate partners, donors, sponsors or volunteers; Lakeshore must be informed of companies that you are seeking support from before they are contacted to ensure that there is no overlap with Lakeshore's current or near future events
- ◇ Lakeshore will not solicit sponsorship revenue
- ◇ Direct sale or promotion of a product or service
- ◇ Funding or reimbursement for expenses
- ◇ Lakeshore will not incur any costs on behalf of any Third Party Fundraising event
- ◇ Confirmed volunteers for your event
- ◇ Lakeshore's insurance policy does not cover Third Party Fundraisers or events



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### ***Use of Logo and Publicity:***

- ◇ Third Party Fundraisers may only use the logo that is provided by Lakeshore Foundation
- ◇ Lakeshore will assist with publicity at our discretion
- ◇ Publicity may not suggest that Lakeshore is involved in any way other than being the designated beneficiary
- ◇ Publicity may not suggest that Lakeshore is a Sponsor or Co-sponsor of the event
- ◇ Lakeshore must approve any Communications piece where the logo or branding is being used, including social media
- ◇ Lakeshore reserves the right to withdraw permission to use the logo or Lakeshore's name at any time
- ◇ The Lakeshore logo may not be used in connection with commercial sales or advertising of goods or services without our prior commitment

### ***Financial Agreement:***

- ◇ Third Party Fundraisers are responsible for payment of all event expenses
- ◇ All tax receipts must follow and adhere to the guidelines and requirements as set out by the Internal Revenue Service
- ◇ Only donations made directly to Lakeshore Foundation are tax deductible to the extent permitted by law
- ◇ A brief Event financial statement/summary including revenues and expenses must be submitted with the Proposal
- ◇ Donations made directly to a Third Party Fundraiser can be used to cover expenses but they may not be tax deductible
- ◇ At the completion of the event, all checks should be made payable to Lakeshore Foundation and be mailed within thirty days to: Lakeshore Foundation, Attn: Jennifer Chandler Stevenson, 4000 Ridgeway Drive, Birmingham, AL 35209



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## Lakeshore Foundation's Third Party Fundraising Proposal Form

Name of Group/Organization proposing fundraiser: \_\_\_\_\_

Name of Individual(s) in charge: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email: \_\_\_\_\_ Phone: home/work/cell \_\_\_\_\_

Date(s) and Time(s) of fundraiser: \_\_\_\_\_ Location: \_\_\_\_\_

Estimated participants/attendees: \_\_\_\_\_ Ticket Price/Admission Cost: \_\_\_\_\_

Describe the event and fundraising components (tickets sales, table sales, auction, Sponsors, etc.):

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Percent of Proceeds to go to Lakeshore Foundation:  100%  \_\_\_\_\_%

Would you like to request a Lakeshore Staff member to be present at your event?  Yes  No

Do you need support materials from Lakeshore?  Yes  No

Description of Materials: \_\_\_\_\_

Will the Lakeshore Foundation name and/or logo be used for the event?  Yes  No

If yes, please describe how the Lakeshore name and/or logo will be used: \_\_\_\_\_

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Will Tax Receipts from Lakeshore be required?  Yes  No



**LAKESHORE Lakeshore Foundation’s Third Party Fundraising Proposal Form (Con’t.)**

Will other entities benefit from this event?  Yes  No

If yes, please list them below:

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Will you be seeking sponsorship/in-kind donations from businesses?  Yes  No

If yes, please list the companies and type of support you will be seeking:

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*\*Lakeshore would like to insure that there is no overlap with current Lakeshore events or events in progress.*

**The Third Party Fundraiser Organizer agrees to the following:**

- A. You acknowledge and agree that neither Lakeshore Foundation directors, officers, employees or volunteers shall be liable in any way, to any person or entity, in connection with the fundraising activities or your actions or inactions in connection with this agreement. You shall indemnify, defend, and hold Lakeshore Foundation harmless, including its directors, officers, employees and volunteers from and against any and all suits, claims, demands, liabilities, damages, costs and expenses (including reasonable attorney’s fees) arising out of or relating in any way to your business and/or the fundraising activities authorized hereunder.
- B. Lakeshore reserves the right to dissolve the Third Party Fundraising agreement at any time.

**I have read, understand, and agree to abide by the preceding guidelines for Third Party Fundraising Events to benefit Lakeshore Foundation.**

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*(Signature)*

*(Print Name)*

*(Date)*

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*(Lakeshore Representative Signature)*

*(Print Name)*

*(Date)*

**Please return completed application to: Lakeshore Foundation, 4000 Ridgeway Drive, Birmingham, AL 35222**

**Attention: Jennifer Chandler Stevenson or email to [jenniferc@lakeshore.org](mailto:jenniferc@lakeshore.org) (205)313-7436**