

## **Fundraising Policies**

Thank you for considering the Foundation for Physical Therapy as a beneficiary of your fundraising event. The Foundation appreciates your efforts to help support our critical mission. Below you will find a copy of the Foundation's policy for third-party fundraising events.

### **Third-Party Fundraising Policy**

#### **Event Income**

- While the Foundation is the recipient of donations raised through third-party fundraising events, the Foundation is not hosting the events. Therefore, unless a donor (corporate or individual) makes the donation payable to the Foundation, we cannot offer a tax-deductible receipt or authorize use of our tax ID # to suggest the donation is tax-deductible.
- Any gift-in-kind (a kind of charitable giving in which, instead of giving money to buy needed goods or services, the good and services themselves are given) donations (such as food, products, or auction items) received to support fundraising events not hosted by the Foundation are not eligible to receive tax-deductible receipts from the Foundation. By law, the Foundation as a non-profit organization cannot provide a donor a tax-deductible receipt for in-kind gifts donated to groups hosting events on our behalf.
- No general solicitations shall be undertaken by telephone, door-to-door, via mail or through the use of professional fundraisers.
- If you or your group does not have a bank account established for fundraising activities, the Foundation recommends creating a separate bank account to accurately keep track of donations received. You are strongly discouraged from using personal bank accounts for fundraising activities.

#### **Event Expenses**

- The individual or group organizing the third-party event is solely responsible for all expenses incurred for conducting the fundraiser unless covered under another written agreement with the Foundation. The Foundation will not be liable for any expenses and will not reimburse the organizer for the purchase of any goods or services. Federal tax laws do not allow third-party events to use the Foundation for Physical Therapy's tax exemption or Federal Employer Identification number when purchasing any goods or services from vendors.

### **Event Insurance and Liability**

- The event planners are responsible for obtaining any necessary permits, licenses, and insurance required for their event.
- The event must comply with all relevant state and federal laws.
- The Foundation for Physical Therapy is not liable for any injuries sustained by event volunteers or participants related to fundraising events benefiting the Foundation for Physical therapy.
- The Foundation for Physical Therapy cannot assume any type of liability for fundraising events.

### **Event Endorsement/Sponsorship**

- In naming your event or promotion, the Foundation for Physical Therapy should be listed as a beneficiary of the event. For example, organizers may NOT refer to the event as the "Foundation for Physical Therapy Bowl-a-Thon"; instead, it could be promoted as a "Bowl-a-thon to benefit the Foundation for Physical Therapy.
- An event organizer may use the Foundation's 501(c)(3) tax exempt status when soliciting financial support from a vendor if the contribution is made to the Foundation.
- An event organizer may not use the Foundation's 501(c)(3) tax exempt status when soliciting gifts in kind from a vendor.

## Event Promotion

- If promotional materials indicate that an event is to benefit the Foundation for Physical Therapy, then proceeds must be donated to the Foundation.
- If only a portion of the proceeds will be donated to the Foundation, promotional materials must provide information to inform prospective donors and supporters. For example, you may include the following statement in promotional materials: Gross Proceeds, Net Proceeds, – or % of proceeds (i.e. state specific %) from this event will benefit the Foundation for Physical Therapy.
- The official logo of the Foundation for Physical Therapy should be appropriately used in conjunction with your event and may not be altered in any way. Any promotional materials should reflect that the Foundation is the beneficiary of the event, but not the host or sponsor.
- Advertising and promotion of the fundraising activity is the sole responsibility of the event organizer, and promotional materials cannot be purchased using Foundation funds.
- Given the Foundation's other fundraising commitments we typically do not provide assistance in the solicitation of sponsorships for event.
- Any direct mail solicitations must be discussed with the Foundation prior to development.
- The Foundation reserves the right to review and approve all promotional materials such as letters, brochures, flyers, posters, tickets, and press releases.

## Acting Ethically and in Good Faith

- Third-party fundraising efforts to benefit the Foundation for Physical Therapy should focus on the mission of the Foundation and on raising funds to support that mission. Fundraising costs should be kept low to maximize the amount

that goes to support the Foundation. Fundraising efforts should maintain the dignity of the Foundation for Physical Therapy.

*Revised 6/15/15*