



Want to Hold a Fundraising Event to Support Children's Heart Foundation?

Thank you for your interest in once again holding a special event for The Children's Heart Foundation (CHF)! We appreciate your support, efforts, and desire to raise funds for life-saving congenital heart defect (CHD) research! Your event supports CHF by increasing awareness of our mission, helping fund the most promising research to advance the diagnosis, treatment, and prevention of CHDs, and building camaraderie, spirit, and enthusiasm in your community.

Your event is a valuable part of our Third Party Fundraiser model; other successful fundraising events benefitting CHF have included galas, family benefits, walks, athletic tournaments, other golf events, and more. To help ensure the success of your fundraiser and help CHF plan for your gracious efforts, we ask that your group follow these guidelines and submit the necessary documents included below.

Your next step is to complete the enclosed **Third Party Fundraising Event Proposal** and return it to our office at info@childrensheartfoundation.org for review, including the anticipated donation commitment to CHF from your event. (A worksheet is included in this packet for your use).

Once we receive your proposal, we will call you with any questions we may have. When your fundraiser is approved, and the Fundraising Agreement is signed by both parties, your team may use the CHF name and logo in accordance with our brand guidelines.

CHF Third Party Fundraising Guidelines:

Event Proposals, Agreements, and Financial/Legal Requirements

- *Proposals and Agreements.* Proposals for third-party events should be approved by CHF in advance. Upon approval of the proposal, your organization must execute a Fundraising Agreement, included in this packet.
- *Budgets.* CHF requests submission of the budget (anticipated revenues and expenses) with your proposal and agreement should also include the net proceed to be awarded to CHF. See the sample template budget in this package.
- *Expense, Fee and Insurance requirements.*
 - Your organization is financially responsible for any expenses or fees incurred by your fundraising effort or event and for any liability arising from the event.
 - CHF is not financially liable for the promotion and/or staging of third-party events and cannot be a cash sponsor.
 - Your organization must obtain its own liability insurance to cover the event.
- *CHF is also willing to:*
 - *Supply CHF collateral and branded promotional items for raffle items.*
 - *Provide event listing on the Foundation website*
- *Representations.* Members of your organization or event may not be identified as representatives of CHF. Any promotion of the event shall avoid statements or appearances of CHF endorsing any product, firm, organization, individual or service.
- *Collection and Submission of Funds to CHF.* The event sponsor should submit collected funds or the proceeds you wish to donate to CHF within 60 days of date of the event.
 - CHF accepts checks and online or other electronic methods (ACH) of payment. Cash must be exchanged for check before submitting.
- *Legal compliance.* Organization must obey federal, state, and local laws, and should also comply with applicable organizational policies and partnership agreements regarding the collection and handling of money.



Event Design

- There are a variety of different events you can host. Please use your imagination and creativity. CHF will review your proposal to determine if the event being held will represent CHF in a manner consistent with CHF's mission, brand, and values. See a list of possible events in our FAQs.
- Once a signed agreement is in place, CHF will provide our “Event Success Kit” to help support your planning and management efforts.
- *Proceeds.* In the event your organization will give less than the full amount of their contribution, you must inform event sponsors, donors, and participants of such on appropriate literature and promotional materials (*i.e.*, “A portion of the net proceeds will go to CHF.”). If the proceeds are divided between multiple organizations, promotional materials must indicate the beneficiaries, and your organization must account for such distribution of proceeds.
- Your organization is responsible for confirming or securing necessary permits, especially those providing alcoholic beverages at an event and raffles/games of chance.

Support from Children’s Heart Foundation

- *Staff support.* CHF has a limited staff. If a staff member or CHF volunteer is available to support or participate, arrangements would need to be made in advance of the event.
- *Promotional support.* CHF must review and approve the use of its brand or logo on any promotional materials, *e.g.*, t-shirts, flyers, advertisements, brochures, flyers, and press releases prior to production or distribution.
- *Donations and Participants platform.* CHF can connect your organization to our payment processing gateway and provide our tax ID for donation purposes. However, CHF will not be responsible for paying event expenses.

Tax Deductibility

Under IRS regulations Section 170(c) for a charitable contribution to be deductible for individual income tax, the individual must pay the donation directly to a Section 501(c)(3) non-profit charitable organization, in this case, CHF. Also, if participants in the event receive goods or services of substantial value, your organization is responsible for notifying participants in solicitations, tickets, receipts or other documents the good faith estimate of the fair market value of the goods and services received and that this amount is not tax-deductible. For example, if the event is a golf event with a ticket price of \$300 where an estimate of the fair market value of the goods and services received (*e.g.*, course fees and food and beverages) is \$100, the participant must be notified that the \$100 in goods and services received is not tax-deductible.

Please direct all questions regarding fundraisers to our team. You may copy our entire group or reach out to individuals as appropriate:

- Lecia Hauer, National Director of Development
(lhauer@childrensheartfoundation.org) for event planning and support questions
- Tierra Lemon, Senior Director of Finance and Administration
(tlemo@childrensheartfoundation.org) for finance questions



Third Party Fundraising Agreement¹

This Agreement is made between Children's Heart Foundation, an Illinois Not For Profit Corporation ("CHF"), and the individual or organization described in the Third Party Fundraising Event Proposal, dated _____, attached, and incorporated as **Exhibit A** ("Organization").

Whereas, the Organization wishes to conduct an event for the purpose of generating funds to donate to CHF in support of CHF's charitable mission of funding the most promising research to advance the diagnosis, treatment and prevention of congenital heart defects; and CHF wishes to assist the Organization in the conduct of such event;

Now, therefore, in consideration of the mutual promises set forth in this Agreement and other valuable consideration, the parties agree as follows:

The Event: The Organization agrees to conduct the fundraising event described in Exhibit A ("**the Event**"), and CHF agrees that the Organization may conduct the Event with the support of CHF in a manner consistent with this Agreement.

Financial: Percentage of Net Proceeds: The Organization agrees to submit _____%, or approximately \$ _____ of the Event's net proceeds to CHF within 60 days following the date of the Event. Funds can be directed to CHF via wire transfer or check. All cash collected shall be converted before being submitted in one of these payment forms.

Attestation: Organizations fully agree that all revenues, sponsorships, contributions, in-kind donations, auction/raffle, supplies or other items of value secured under the auspices of the Event where CHF is a designated beneficiary shall accrue to the full financial accounting of the Event. Under no circumstances may an individual take personal ownership of or otherwise distribute any items of value secured for the Event except in service of the Event and its full financial accounting.

Branding, Banners, and Logo Usage: No CHF brand materials or logo may be used by the Organization until both parties have executed this Agreement. CHF's official name is Children's Heart Foundation, which the Organization may abbreviate as "CHF" on materials in which CHF's name is repeated. Use of the CHF name in publicizing the Event shall not imply that the Event is being hosted or sponsored by CHF. Listing the Event name, followed by "benefiting Children's Heart Foundation" will help clarify that CHF is simply a beneficiary of the Event. CHF may provide a list of CHF branded materials, a limited number of which it will make available for use at the Event at the Organization's request. At the Organization's request, CHF will also provide a high quality graphic file of its logo for use at the, or in publicity for, the Event. The CHF logo may not be modified in any way other than scale. Fundraisers agree to adhere to CHF's Brand Guidelines and Standards, relevant components of which will be supplied to the Organization upon completion of the Third Party Fundraising Agreement.

Web and Graphic Design: If the Event is co-sponsored by CHF, CHF shall approve in advance the purchase and use of any website domain names. CHF shall also review and approve the content of a website related to the Event before the website is made live. CHF shall approve all Event marketing related materials prior to printing and distribution. If the Event's proceeds are benefitting CHF, the Organization shall be responsible for the costs of all website and graphic design.

Media and Photo Release: If media (e.g., TV, radio, newspaper, or bloggers) will be present at the Event, the Organization shall notify CHF in advance so that CHF can provide the Organization with key data about CHF, and any talking points that will help publicize the Event and the purpose for which it will raise funds. The Organization is encouraged to take photos of the Event, provided however, that, if it does, it shall display signage

¹ Please complete this agreement if your proposal has been approved. Once you review and understand the terms of this document, please return a signed copy to CHF.



alerting Event guests that photos are being taken and may be used for media purposes by the Organization and CHF in the future, which signage shall contain the following language:

This event is being photographed for possible distribution. Entry to this event grants consent for CHF and [name of Organization] to use photos, which may include your image, for their media purposes.

Sponsorship (if applicable): Organization shall make all Event sponsorship solicitations. CHF shall not solicit sponsorships for the Event on the Organization's behalf or be a cash sponsor itself. However, CHF staff can offer support and guidance to the Organization by providing sample text for sponsorship packets or letters, brainstorming prospective sponsors, and defining appropriate sponsorship incentives.

Legal and Insurance: The Organization shall be responsible for obtaining such insurance as it considers necessary and appropriate for the Event. CHF maintains liability insurance related only to its own legal liability and does not provide coverage to any third party or Event participant.

In witness whereof, the parties have executed this Agreement as of the dates shown below.

Children's Heart Foundation

Organization

By Gail Roddie-Hamlin
Its President and CEO

By _____
Its Primary Contact

Date _____

Date _____

Please scan and email a completed and signed Third Party Fundraising Event Agreement to:

Children's Heart Foundation
Subject Line: Third Party Fundraising Event Agreement
Attention: President and CEO
Email: info@childrensheartfoundation.org

Thank you for supporting Children's Heart Foundation!



FAQ—Frequently Asked Questions

What is a Third Party Fundraiser?

A third party fundraiser is an event or program hosted by a business, organization, community group, school or individual hosts for the benefit of CHF. It is planned and executed independently of CHF or any of its affiliates.

Why should I have a Third Party Fundraiser for CHF?

CHF's mission to fund the most promising CHD research is funded entirely by donations from individuals, events, or other fundraising strategies. To help advance our mission, we need your help. Your fundraiser is a great way to engage with your network about a cause you deeply care about. Thank you!!!!

I want to organize a fundraiser for CHF but I'm not sure what to do.

Listed below are some ideas of the many ways that you can help raise funds and awareness for CHF or any of its local regions. This list is by no means exhaustive; let your creativity guide you!

- Change My Heart (CMH) is a fun and easy way to raise much needed funds and awareness for Congenital Heart Defects (CHDs)! Change My Heart is designed to be a fundraiser dedicated to collecting donations in your school, classroom, workplace, community, *etc.* This fundraiser can be as simple or creative as you'd like to make it. You can hold a Change My Heart fundraiser any time throughout the year!
- Congenital Heart Walk is the only national event series dedicated to raising awareness and funds for fighting congenital heart disease. Learn more about a walk in your area by visiting www.congenitalheartwalk.org.
- Host a fundraiser: Host a benefit concert, have a bake sale, a carwash or donate a percentage of a designated night's profits. Be Creative!
- Designate CHF as the beneficiary for your event: If your business or organization hosts an annual event that generates funds, consider donating a portion of the proceeds to CHF.

I want to host a fundraiser, what should I do next?

- Contact the National Office at 847-634-6474 for advice and ideas, or complete the **Third Party Fundraising Event Proposal** to begin the process.
- Once you have approval of your proposed fundraiser, you will submit a Third Party Fundraising Proposal and Agreement. After this agreement is signed and returned to CHF, you are ready to start promoting your event!

What can CHF do to help with my fundraiser?

We are here to help. Below is a list of some of the things we can offer to connect you to potential volunteers in your area:

- Promote your event through our communication portals, website, newsletters, Facebook and Twitter
- Provide promotional materials and some basic giveaways. These include, but are not limited to, brochures about programs and services, table giveaways such as pens, pencils, stickers, or other supplies available within our inventory.
- A representative from CHF or its numerous volunteers to speak at your event
- Connect you to known supporters, partners, and/or vendors to provide product, support, and services for your event. A list of supporters, partners, and/or vendors are provided on the subsequent pages.
- CHF can provide access and use of our payment processing gateway, and our tax ID for donation purposes.

What is the Organization responsible for?

The event sponsor is responsible for all details of the event including:

- Underwriting all of the related costs, obtaining any required liability insurance and adhering to all federal, state and local laws.
- Printing of any promotional or event materials
- Creating flyers to publicize the event
- Working at the actual event
- Compliance with all applicable CHF brand guidelines



Sample Budget

Revenues	
Registration Fees/Ticket Sales	\$ -
Sponsorships (list)	
Auction	
Raffles	
Donations	
Other (describe)	
In-kind donations (list each item including estimated value in this column for informational purposes only)	
Total Revenues	-
Expenses	
Facilities	
Food & Beverages including applicable taxes and gratuities	
Guest Gifts/Packages	
Promotional Items (shirts, giveaways, etc.)	
Permits	
Event insurance	
Security (e.g., personnel or equipment)	
Fundraising tools (e.g., games, raffles, auction items), supplies	
Volunteer Recognition (e.g., event t-shirts, thank you notes)	
Project Manager or any event planning/execution labor	
Signage, Supplies/Postage and Decorations	
Marketing and Communications/PR/Advertising	
Equipment rental costs	
Photography	
Sanitation	
Medical	
Credit Card Processing Fees	
Others (describe). CHF expects organizers to assume incidental costs in support of the event. For questions, contact our team.	
Total Expenses	-
Net Income	\$ -