





## FUNDRAISING EVENT APPLICATION AND AGREEMENT *(Estimated Budget)*

*Complete an estimated budget including projected gross revenue from identified sources and projected expenses with name of vendor. Use additional sheet if necessary.*

Fund name

Name of fundraising event

Submitted by

Date of event

Estimated Revenue		
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
		Total Revenue (TR)

Estimated Expense		
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
		Total Expense (TE)
Estimated Event Net Income (TR-TE)		\$

Estimated Value of Goods and Services*		
	\$	
	\$	
	\$	
	\$	
		Total Value/Cost
		\$
		Est. Attendance
		Per Person "Quid Pro Quo" Disclosure
		\$

*\*Please contact the Foundation for assistance with this important estimate and mandatory disclosure.*



# FUNDRAISING EVENT APPLICATION AND AGREEMENT

(Event Planning Checklist)

The purpose of this checklist is to assist event organizers and Foundation staff in planning and administering a fundraising event that will be in compliance with all federal laws. This document may be used to identify and/or assign certain tasks or other requirements leading up to the event date. This document will be retained in the applicable fund's permanent file as part of the accounting and compliance efforts for this fundraising event.

Chapter/Event name

Event date

Purpose

### Event Scheduling and Application Process

- Fundraising Event Application submitted on \_\_\_\_\_
- Event Planning Checklist reviewed by Foundation on \_\_\_\_\_
- Estimated event budget submitted on \_\_\_\_\_
- Quid pro quo value of benefits determined and equals \$ \_\_\_\_\_

### Required Disclosures

- The fund must disclose its affiliation with the Foundation on all advertising media.
- Quid pro Quo value of benefits must be disclosed on all event materials that lists the cost to attend the event.

### Payment and Reservations

In all cases, attendee payment will serve as his or her reservation, unless the event organizers distributed tickets. Payment options include mailing in checks or online donations through [www.deltafoundation.net](http://www.deltafoundation.net).

Under no circumstances will the Foundation invoice for payments from individuals or distribute tickets.

### Event Revenue Sources

- One general ticket price \$ \_\_\_\_\_
- This event has the following different levels of ticket revenue  
\_\_\_\_\_  
\_\_\_\_\_

- This event has the following sponsorship levels (list each level and any benefits received)  
\_\_\_\_\_
- This event will receive non-cash (in-kind) contributions (include the name/address of the donor/company, a detailed description of the donated item, expected date of receipt and the estimated market value)
- This event will receive donated items for an auction
- List of auction items/estimated values and proposed donors submitted on \_\_\_\_\_

Please describe any other sources of event revenue

\*You must submit a final list of non-cash contributions no later than 15 days after the event.

**Processing Event Expenses**

All event expenses must be identified and estimated in an event budget. Last-minute expenditures that are not identified in the event budget may not be able to be reimbursed or paid from the applicable fund and may become the responsibility of Delta. Such unauthorized expenditures will not qualify for a tax deduction. The preferred method of paying event expenses is to have all vendor invoices paid by Delta and then confirmed invoices and proof of payment submitted to the Foundation for reimbursement. Alternatively, invoices for approved expenses can be signed off on by Delta and submitted to the Foundation for direct payment. The Foundation will not accept invoices directly from vendors.

Do not enter into any contracts or promises in the name of The Delta Foundation. The Delta Foundation is not responsible or liable for expenses which exceed unrestricted proceeds.

Donors to this event may want to *underwrite* specific event expenses. Donors are advised not to  *earmark* their support for a specific event expense, as this may affect the tax deductibility of their contribution. General or *unrestricted* support is encouraged when underwriting event expenses.

**Timing of Expense Processing**

Please allow 10 business days for processing all expense payments and/or reimbursement checks.

**Review of All Promotional Material**

*IRS Publication 1771, Charitable Contributions – Substantiation and Disclosure Requirements* provides detailed requirements for charitable organizations when soliciting and acknowledging charitable contributions. These requirements sometimes call for specific disclosures, at various times, when charitable organizations conduct fundraising events. Accordingly, the Foundation must review all promotional materials for fundraising events before they are released. A sample list is provided on page 5.

This event will include a save-the-date mailing, a formal invitation mailing and a solicitation for sponsorship(s).

**Save-the-date mail date** \_\_\_\_\_

**Formal invitation mail date** \_\_\_\_\_

**Solicitation for sponsorship(s) mail date** \_\_\_\_\_

List Names, address, phone, email and sponsorship request (attach additional sheet)

This event will include a press release, an article in a newsletter and digital/electronic communication (email).

**Press Release mail date** \_\_\_\_\_

**Article Newsletter mail date** \_\_\_\_\_

**E-Mail date** \_\_\_\_\_

This event will include posting on a social networking site and a TV/radio announcement.

**List Social Networks** \_\_\_\_\_

**Postdate** \_\_\_\_\_

**TV/Radio Air date** \_\_\_\_\_

This event will have printed tickets

**On-sale date** \_\_\_\_\_

The following promotional materials were reviewed and approved by the Foundation:

Draft#	Document description	Approved by
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



## FUNDRAISING EVENT APPLICATION AND AGREEMENT *(Retail Community Charity Event)*

The Delta Foundation and \_\_\_\_\_ are once again participating in Community Charity Days with \_\_\_\_\_ Department Stores. Please sign below to confirm that all dollars raised by your Chapter through the sale of coupons will be deemed to be held in trust, with the Delta Foundation as the grantor, and the funds will be used by the Chapter solely for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code.

Brittany Grimes Zaehring, Esq., MSSA

\_\_\_\_\_

Director of Operations  
The Delta Research and Educational Foundation

**ACKNOWLEDGED AND AGREED:**

Name of Chapter:

\_\_\_\_\_

By: \_\_\_\_\_

Its: \_\_\_\_\_