

Make a Change

FUNDRAISING TOOLKIT



**The
Family
Tree**

Raising families up.

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EVENT IDEAS

Here are some ideas to think about as you begin to brainstorm. Be creative in how these ideas can be done virtually or with social distancing. Some traditional fundraising events may need to wait until pandemic conditions have changed.

Personal Events

Compete for Us

Run, bike, walk, swim – set your goal and raise funds for The Family Tree – Be sure to have participants post pictures for maximum fun.

Host an Event

- **Game Night** – Gather friends together to play parlor games or through an online game platform.
- **Wine and cheese night** – Have your friends put together a list of favorite wines and cheeses or ones that they would like to try. Collect donations to The Family Tree as admission and enjoy the fun.
- **Birthday Party** – Ask for donations to The Family Tree in lieu of presents but take the opportunity to share time with family and friends. Silly party hats are encouraged!

Garage Sale

Is it time to declutter? Hold a garage sale with all proceeds going to The Family Tree. Get the whole family involved.

Corporate Events

Holiday Party

If your office hosts a Holiday Party, check with your company to see if it would consider having employees make gifts to The Family Tree instead of a secret Santa. Your company may even be willing to match gifts!

Lunch and Learn

Feature a presentation by a speaker on a topic that interests your co-workers. The price of admission is a donation to The Family Tree.

Silent Auction

Assemble items such as artwork, gift baskets containing a mix of items and gift certificates, wine baskets, seasonal baskets or other objects you feel your co-workers and their families might enjoy. Many organizations will contribute merchandise, tickets, or gift certificates for a charitable cause.

Chili Cookoff

Spice up lunchtime by seeing who in the office makes the best chili. Sell tickets at the door to the lunchroom or conference room. People can vote on their favorite.

School Events

Bake Sale

Create a bake sale at your school to support The Family Tree.

Lemonade Stand

A stand-alone event at school or host it in conjunction with one of the other suggested school events.

Math Achievement

Parents and Teachers sponsor a student to complete math worksheets, donating a set amount for each completed worksheet. Proceeds are donated to The Family Tree.

Arts and Crafts Fair

Put on an arts and crafts fair in with all sales being donated to The Family Tree.

Additional Event Ideas

While social distancing is in effect, see what you can do with **virtual events** – like virtual game night or virtual quiz night. Here are some suggestions but please feel free to think creatively and come up with something new!

Personal Events

Birthday Party
Golf Tournament
Garage Sale
Holiday Party
Barbecue
Art Show
Game Night
Holiday Open House
Private Shopping
Wine and Cheese Night
Fun Run
Sporting Event

Corporate Events

Holiday Party
Gift Wrapping
Shred-a-Thon
Home-made Chili
Competition
Speaker Series
Pot Luck Lunch
Silent Auction
Golf Tournament
Lunch and Learn
Company Picnic
Team Sporting Event

**The best advice we can give you for planning your event is to allow enough time.
You'll need sufficient time to plan and to execute, don't skimp on time.**

02

TIMELINE AND STEPS

Got your idea ready? Here's a step-by-step guide for how to organize your event.

TIMELINE AND STEPS

Step 1 - Eight to Ten Weeks Before the Event

Download and review the toolkit and event application form. Brainstorm event ideas. Fill out the application and submit it to The Family Tree at least eight weeks before your event. Allow one week to receive approval from The Family Tree for your event. We appreciate your generosity so we will make reviewing your application a priority. We can also give you tips on event planning and fundraising, plus logos you can use. We're here to help!

Step 2 - Six to Eight Weeks Before the Event

Gather friends, family, or co-workers to help plan and carry out the event. Write a To Do List and timeline, allowing plenty of time for planning. Be sure to include any special event permits you may need and allow time for those applications to be submitted and approved. Don't forget event insurance.

Step 3 - Four to Six Weeks Before the Event

Make your event budget and promotion plan. Decide on your goal. Keep costs low to maximize the impact of your fundraising. Book your event. Consider any additional needs for the venue. If you will be seeking sponsors, you must submit a list of potential sponsors to The Family Tree *before* you contact them.

Step 4 - Four Weeks Before the Event

Social media is vital to promote your event. You may want to create a fundraising page through Facebook or JustGiving or other fundraising platforms. In addition to promotion, they enable you to take payments online and track your participants' data. They also generate tax receipts for you and will help you track your fundraising goals. Review the Toolkit to make sure you understand how tax receipting works.

Continued➤➤

TIMELINE AND STEPS

Step 5 - Two Weeks Before the Event

Provide The Family Tree with a copy of insurance you have secured for your event. Send out event reminders. Review your plan and To Do List.

Step 6 - Day of the Event!

The day is here at last to have your event! Take lots of pictures if you can and share them with The Family Tree. You can tag us at Facebook, Twitter, or LinkedIn or Instagram, or email photos to Connie Anderton at canderton@familytreemd.org

Step 7 - Within 30 Days After the Event

Donate funds to The Family Tree. If you are not using an online platform, be sure to track donors so we can provide tax receipts. (See guidelines below on page #). Thank your donors, volunteers, sponsors, and any other supporters.

FINAL STEP - CELEBRATE!



03

GUIDELINES



All the details to help guide you in the right direction.

What The Family Tree CAN Provide

- Professional advice on fundraising and event organization through a phone call or meeting
- The Family Tree print materials (depending on availability)
- The Family Tree logo (all materials with The Family Tree logo must be individually approved by The Family Tree prior to printing, release, uploading, etc.)
- A Family Tree representative to talk about the importance of preventing child abuse and neglect, at your event (depending on availability)
- A letter of support to be used to validate the authenticity of the event
- Tax receipts for eligible gifts (if not provided by online platform)

What The Family Tree CANNOT Provide

- Funding or reimbursement for event expenses
- Promotion or advertising of your event except on our website, e-newsletter and social media
- Donor or sponsor lists
- Applications for permits
- Prizes, auction items or awards
- Insurance for your event
- Logistical support for your event
- The Family Tree will not assume any legal or financial liability for a community fundraising event.
- The Family Tree is not responsible for any damage or accidents to persons or property at the event.

As the Event Organizer, Your Responsibilities Include:

- Submit the Fundraising Event Application to The Family Tree at least eight weeks prior to your event to allow us time to review your request. *Please allow one week for The Family Tree to approve/decline your event application.*
- Event organizers must receive written permission from The Family Tree in advance. Do not make public announcements or promote your event as benefiting The Family Tree until you receive written approval of your event application from The Family Tree.
- Event organizers are responsible for the planning and execution of the event including but not limited to, all set-up, promotion, staffing and/or volunteers, liability and expenses.
- Event organizers are responsible for obtaining appropriate permits and insurance and submitting proof to The Family Tree.
- It is the event organizer's responsibility to communicate to sponsors, participants and the general public that The Family Tree is not hosting the event but is the beneficiary of the event.
- All sponsor solicitations for the event must be approved by and coordinated with The Family Tree's Development Department prior to approaching any individual, corporation or foundation for this purpose.
- No community fundraising event can use "The Family Tree" in the event title, instead it must say proceeds will benefit The Family Tree.
- All community event promotional material must include the text, "Proceeds from this event will be donated to The Family Tree".
- The event organizer must get prior authorization from The Family Tree to use The Family Tree logo or name on any promotional material. All publicity must be approved by The Family Tree prior to being printed or released.

Event Organizer Responsibilities, continued:

- The Family Tree shall have the right to, at any time and for any reason, request that the event organizer/group cease to use The Family Tree's name and logo in connection with the event and the event organizers shall use its best efforts to comply with such request.
- The Family Tree reserves the right to not approve any fundraising event and is not obliged to provide a reason. The Family Tree reserves the right to refuse funds raised at unapproved events and activities.
- The Family Tree does not endorse firms, organizations, individuals, or services. Therefore, fundraising events must be promoted and conducted in a way that avoids any statement or appearance of an endorsement by The Family Tree.
- Event organizers must comply with all relevant local, state, and federal laws.
- If the event is cancelled, please notify The Family Tree at least one week prior to the event date.

Financial Guidelines

The Family Tree is not responsible for any costs related to the fundraising event. All expenses related to the event must be covered by the event organizer or deducted from the proceeds before donations are sent to The Family Tree.

The fundraising event organizers agree to handle all monetary transactions for the event and to present the proceeds to The Family Tree within 30 days of the completion of the event or as otherwise agreed to.

If you are using an online platform for your event fundraising, tax receipts may be issued directly by the platform, be sure to check with the provider. If you are not using an online platform and tax receipts are requested for donations over \$25, you are responsible for collecting the names, amounts and contact information for all donors to be shared with The Family Tree so we can issue tax receipts and also expand our donor database. Tax receipts will be issued in accordance with IRS guidelines.

For more information see <https://www.irs.gov/pub/irs-pdf/p526.pdf>

If event expenses are greater than the total collected, the event organizer is responsible for payment of these additional expenses. The Family Tree is not responsible for the costs of fundraising or for any shortfalls relating to the event. The Family Tree reserves the right to see financial records related to the event.

For the purposes of receipting, individual donors should make their checks payable to **The Family Tree, Inc.** and delivered to:

The Family Tree
2108 N. Charles Street
Baltimore, MD 21218

Tax Receipt Guidelines

Before you plan your event, be sure to understand the rules about tax receipts. For further explanation of what can be receipted, please speak with The Family Tree Development Department, Connie Anderton canderton@familytreemd.org. It is your responsibility to communicate with donors regarding tax receipts.

The Family Tree will only issue tax receipts for the amount of the actual donation received by our agency, as allowed by the IRS. Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the event organizer.

The Family Tree is permitted to issue tax receipts to individuals that make a donation without receiving a tangible item or benefit in return. Tax receipts are provided for donations of \$25 or more.

Tax Receipts will not be issued for the following:

- Purchase of admission tickets, green fees or auction items
- In-kind goods donated to an event
- Gift certificates donated by the issuer of the certificate
- Donated service such as hiring an entertainer or auctioneer for the event
- Sponsorships (because advertising or promotion is being received in return for the sponsorship)
- Full ticket price of a ticketed event. Tax receipts will only be issued for the ticket price less the value received by the donor.

03

FREQUENTLY ASKED QUESTIONS

If you still have questions after reviewing these FAQs below, please don't hesitate to contact us at canderton@familytreemd.org.

FREQUENTLY ASKED QUESTIONS

1. Can we hold any type of event?

Community events are required to adhere to our core values and mission. We are unable to participate in any event that goes against our core values or could be deemed as discriminatory or offensive. If you need help selecting a type of event, contact us – we are happy to help!

2. Will The Family Tree help with event expenses?

The Family Tree is unable to help with expenses associated with your event. All expenses are the responsibility of the event organizer. We recommend keeping your expenses low to create the greatest impact for The Family Tree.

3. Can we designate where the funds go?

Funds will be used to support our programs to prevent child abuse and build strong families. If you wish to designate your funds, please speak to us before your event.

4. How will charitable receipts be issued?

The Family Tree is a registered charity and we can provide charitable donation receipts for gifts in accordance with the IRS. Not all donations are eligible for receipts; please discuss with us any questions regarding receipting before your event. Tax receipts may be issued through the use of an online platform or can be issued by The Family Tree on receipt of the guest's full name, address and donation amount.

5. Can The Family Tree provide promotional materials?

Please discuss with us. We may be able to provide print material about our programs and services with advance notice.

6. Do we need any licenses for our event?

Yes. Proof of appropriate licenses and permits will be required by The Family Tree in advance of your event and are the sole responsibility of the event organizer. Don't forget event insurance.

7. Who is responsible for liability and legal risks associated with our event?

Event liability is the sole responsibility of the event organizer. The Family Tree will not sign any vendor contracts or be held responsible for any damage or loss associated with the event.

**If you still have questions, please don't hesitate to contact us at
canderton@familytreemd.org.**