

Alzheimer's Association

Third-Party Host Fundraising Event Agreement

The Alzheimer's Association thanks you for your interest in hosting an independent third-party fundraising event to benefit the Alzheimer's Association. Events such as yours are important in the Association's efforts to raise funds and awareness to end Alzheimer's disease within our communities.

In addition to third-party fundraising events, the Alzheimer's Association has approximately six (6) full-time staff who have direct management of 11 established Alzheimer's Association events, which raise more than one million dollars cumulatively, on an annual basis including:

- **The Walk To End Alzheimer's**— Seven (7) walk sites in Greater Baltimore, Western Maryland and the Eastern Shore (October)
- **Galas**— Two galas in Frederick & Baltimore (March-May)
- **ALZ Stars (Competitive Marathon & Bicycling Events)**—Baltimore Marathon (Baltimore) and Seagull Century (Salisbury)- both take place in October ; and
- **Major Donor Receptions**- Quarterly

The following fundraising activities are prohibited in conjunction with third-party event for the benefit of the Alzheimer's Association:

1. Programs that raise money on commission;
2. Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity; and
3. Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or internet).
 - The Alzheimer's Association may direct you, and you agree to comply with the direction, to cancel your event and withdraw any and all use of the Alzheimer's Association's name in association with your event. Such direction may occur for any reason, including the Alzheimer's Association's belief that an association with your event or any consequences that contribute to or result from your event may have a negative effect on the mission, credibility, or reputation of the Alzheimer's Association.

THIRD-PARTY EVENT GUIDELINES

I. Promotion and Logo Usage

- The Alzheimer's Association has no fiduciary responsibility for your event(s) and assumes no liability for its planning or execution, including all promotion, set-up, staffing (including volunteers), or the collection and management of funds/donations.
- You may request the use of an electronic-format logo ("have fun, do good, end Alzheimer's" graphic), which you may freely use in the promotion and carrying out of your event. You are strictly prohibited, however, from using any other trademark, service mark, logo or copyrighted materials of the Association for your event(s) without the express written consent of the Association.

- The Alzheimer's Association does not endorse products, firms, organizations, individuals, or services. Accordingly, your event(s) must be promoted and conducted in a manner that avoids any statement or appearance of an endorsement by the Alzheimer's Association.
- All promotional materials must clearly state that your **event is raising funds that will benefit the Alzheimer's Association rather than an event hosted by The Alzheimer's Association**, and include the percentage or amount that will be donated to the Alzheimer's Association.
- The Alzheimer's Association staff role is to support approval of third-party events. The Association can also provide logos, materials, and other supporting documents as appropriate. **Association Staff typically do not attend third-party events due to multiple existing events run by the Association annually (see listing noted above)**. The Alzheimer's Association will not solicit sponsors or auction items for your fundraising event—and does not provide any donor, volunteer, or celebrity contact information, mailing lists, press contacts, press releases, or formal advertising.

II. Finance and Tax Rules

The Alzheimer's Association will process only the final net proceeds of event(s). Under no circumstances will third-party event revenues and expenses flow through the Association.

The Alzheimer's Association must receive all net proceeds within (30) business days of the conclusion of each event and/or promotion. The event host will also provide the Association a completed *Host Report Form* recording the net donation and individual contributions.

Only your individual donors who have written checks to the Alzheimer's Association will receive an official acknowledgement from the Alzheimer's Association.

- You may not establish a bank or other deposit or transaction account in the name of the Alzheimer's Association. If payments are made to the organizer, and the event organizer is not an IRS qualified organization, the payments will not be deductible for income tax purposes. If the payments are made to the Alzheimer's Association, donations to the Alzheimer's Association are typically tax deductible, though you should consult your tax advisor.
- The Alzheimer's Association sales tax exemption(s) (on purchases) cannot be extended to any event or fundraising effort.
- In keeping with fundraising standards, no more than 25% of gross revenue from the event may be spent on event expenses. At least 75% of gross revenue must go to the Alzheimer's Association, and all material publicizing the event must list the percentage that the Alzheimer's Association will receive. For example, promotional/marketing materials should state, 'The Alzheimer's Association will receive at least 75% of the proceeds collected for this event.'

III. Collateral and Communications

- Invites, press releases, brochures and all other written communication must be approved by the Alzheimer's Association before printing or going live via the internet.
- If there is an error in the print material(s), without approval from the Alzheimer's Association, the Association has the full authority to request reprints and/or revisions, at the financial expense of the event host.

IV. Liability and Cancellation

All third-party events must:

- Comply with all federal, state and local laws applicable to any event, including fundraising rules and regulations.
- Determine the extent of and obtain its own liability insurance for the event sufficient to cover any claim that may arise out of the event. *The Alzheimer's Association will not provide our liability insurance for third-party events regardless of special circumstances that may arise.* The third-party event organizer agrees to indemnify and hold the Alzheimer's Association harmless from and against any and all losses, damages, costs, attorney's fees, expenses, and liabilities incurred in connection with, or with the defense of, any claim or action or proceeding arising out of or incurred in connection with the event.
- Obtain all permits and/or licenses necessary for fundraising in the city in which the event is to occur, the sale or service of liquor, and the hosting of raffles and/or games of chance.
- The Alzheimer's Association Development Director must see all copies of permits and approve them prior to approval of the event.
- A letter from the main point of contact at the venue or host of the event [confirming agreement with the event date, time, and location of the event; as well as understanding that the event is third-party hosted by an independent event host] is required to be presented for the Alzheimer's Association's Development Director prior to approval of the event.
- Inform invitees and participants that the event is not produced, supervised or sponsored by the Alzheimer's Association and that the Alzheimer's Association is neither responsible nor liable for any acts or omissions related to the event.

V. Media

- The Alzheimer's Association needs to be informed of and approve all press and media coverage for third-party events.
- Media training may be required by the Alzheimer's Association's Communications Manager.

VI. Miscellaneous

You, as the third-party independent event organizer, must register your event 30 business days in advance with the Association by accepting this agreement.

I accept and agree to abide by the terms of these guidelines with respect to my Event (s) to benefit the Alzheimer's Association. I hereby release and agree to indemnify and defend the Alzheimer's Association, its officers, directors, employees and agents, from and against any and all claims, loss, liability, damages and expenses (including reasonable attorney's fees and other costs of litigation) imposed against or incurred by the Association arising out of or related to any event I host or any violation by me of these Host Guidelines.

Name: _____

Signature: _____

Date: _____



HOST AN EVENT AGREEMENT

Name of Host: _____

Organization: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

Please provide the following details about your event:

Date: _____ Time: _____

Location (full street address, city/state/zip): _____

Name of Event / Type of Event: _____

Anticipated number of attendees: _____

Please list all key individuals and organizations involved with this event, with their affiliations:

What is the total amount of revenue you estimate will be generated from the event?

- Total revenue anticipated _____
- Total expenses projected _____
- Estimated amount that will be donated _____
- Other _____

How will you promote the event (invitations, brochures, posters, media?), and to whom (family and friends, the general public, work colleagues)?

Would you like to receive an electronic version of a logo to use on your promotional materials? (circle one)
yes no

Would you like to receive educational materials about Alzheimer's disease and the Alzheimer's Association to have on display at your event? (circle one) yes no

Why did you select the Alzheimer's Association?

Have you participated in any activities of the Alzheimer's Association (conferences, support groups, other fundraising activities)? If yes, please explain.

Thank you on behalf of the Alzheimer's Association for your efforts to raise funds in support of our mission. Your time and commitment are deeply appreciated.

Please return the completed forms with applicable permits and letters from event venues/hosts confirming the event time, date, and location (see section IV) to:

Alzheimer's Association, Greater Maryland Chapter
Attn: Lisa Berthiaume, Development Associate
1850 York Road, Suite D Timonium, MD 21093
lisa.berthiaume@alz.org 410-561-9099 (phone)

Upon receipt of your completed forms, you will receive an official letter from the Alzheimer's Association signifying our receipt of your signed "Host An Event Agreement" Form, indicating approval of your third-party event.

If the Alzheimer's Association has questions or needs clarification regarding your third-party event meeting the Association guidelines, a representative will be in touch with you via telephone and/or email for further clarification,

*You will also receive a post-event Host Report Form and return envelope for ease of turning in your collected contributions.

>>If you would like for an Alzheimer's Association Representative to accept donations from your third-party event in person, such as a through a check presentation, the Association will need four (4) to six (6) weeks notice of the desired date from the event organizer—to ensure a representative will attend.