Agreement and Guidelines for Third Party Fundraising Events
Agreement to Host an Event, Activity or Promotion Benefiting the Alzheimer’s Association

Thank you for your interest in hosting a fundraising event to benefit our Chapter. Events such as yours are important to the Association’s efforts to increase public awareness and support our battle against Alzheimer’s and related diseases. Below are helpful guidelines to enable you to produce a successful fundraising event.

Guidelines for Promotion and Use of Our Logo

- The Alzheimer’s Association does not endorse products or services, businesses, organizations, or individuals. Accordingly, your event must be conducted in a manner that avoids an appearance of endorsement by our organization.
- You are welcome to use the Alzheimer’s logo; however, our Chapter must approve all uses of our logo on your promotional materials in advance. The logo will be made available upon approval.
- Promotional materials must clearly state that your event is raising funds that will benefit the Alzheimer’s Association, and include the amount or percentage from each transaction that will be donated to the Alzheimer’s Association. For example: $5 from each ticket sold will benefit the Alzheimer’s Association, or 70% of gross proceeds from this event will benefit the Alzheimer’s Association.
- The Association cannot solicit sponsors for your event, nor does it provide contact information for any donor, volunteer, or celebrity. It cannot provide mail or e-mail lists, press contacts, press releases or pro-bono or paid advertising.

Financial, Transactional and Tax Guidelines

- The Alzheimer’s Association will process only the final bulk net proceeds of this event. No unrelated, third-party revenues or expenses can flow through Association accounts.
- Unless advance arrangements are made with the Association, all net proceeds must be delivered within 30 business days of the event’s conclusion. The event host will provide the Association with a post-event report, noting contributions, expenses, and net proceeds.
- You may not establish a bank, deposit or transaction account in the name of the Alzheimer’s Association.
- IRS guidelines do not grant tax-deductibility status for any funds, goods or services that are channeled through non-related third parties.
- Please note: if you are not an IRS qualified nonprofit organization, no payment of monies, goods or services delivered directly to you can be deducted for income tax purposes. Please consult a professional financial advisor for advice on how this may impact your particular situation.

Alzheimer’s Association sales tax exemption, if any, cannot be extended to any unrelated third party fundraising effort.

In keeping with recognized fundraising standards, we recommend that no more than 30% of your gross income be used for expenses, and that at least 70% of your gross benefit the Alzheimer’s Association. Invitations and promotional materials bearing our logo must list the percentage of the gross, or the minimum amount from each transaction, that the Alzheimer’s Association will receive. A sample budget is included to help you better determine potential outcomes.
Non-Liability and Cancellation

- The Alzheimer’s Association has no fiduciary responsibility and assumes no liability for third party event planning, execution, promotion, set-up, staff (including volunteers), or the collection and management of any donations not made directly to the Association.
- Your event must comply with all federal, state and local laws applicable within the jurisdiction determined by the event’s location.
- You must determine sufficiency of and obtain your own liability insurance to cover any claim that may arise out of the event.
- As event organizer, you agree to indemnify and hold harmless the Alzheimer’s Association against any liabilities, losses, damages, costs, legal fees or other expenses incurred in connection with, or in defense of, any claim or action incurred by your event.
- As the event organizer, you must obtain all permits and/or licenses necessary for fundraising, sale or service of liquor, hosting raffles or games of chance applicable in the jurisdiction in which the event occurs.
- Promotional materials, whether printed or electronic, must state that your 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 production of your event.

By signing below, you accept and agree to follow these guidelines in exchange for use of the Alzheimer’s Association logo for your benefit activity. Please sign and return this form by mail or by fax as listed below. If you have further questions, please contact Cindy Godwin at (904) 281-9077 or Cindy.Godwin@alz.org. Again, thank you for your support of the Alzheimer’s Association, Central and North Florida Chapter.

We wish you great success!

_________________________________________  __________________________
Kay Redington, CEO  
Alzheimer’s Association, Central and North Florida Chapter

_________________________________________  __________________________
Host Name  
Host Title:
Third Party Event Application

Date: _________________

Contact Name: ________________________________________________________________

Title: ________________________________________________

Company/Organization: _______________________________________________________

Address: ___________________________________________________________________

City/State/ZIP: ______________________________________________________________

Business Phone: ___________________________    Fax: ___________________________

Email: _____________________________________________________________________

Event Description:

Name of your event: _________________________________________________________

Date(s)/Time of your event: _________________________________________________

Location of your event: _____________________________________________________

Description of event: _______________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Total anticipated revenue: $ _________________

Total anticipated expenses: $ _________________

Total anticipated donation: $ _________________
How many individuals do you expect to participate? ________________________________

Have you considered your budget and all potential expenses necessary for your event? (see sample budget below)

Yes _____  No_____  Not yet, but will _____

Please list the key parties involved in the planning and execution of your event, including individuals, sponsors, companies, organizations, media, etc.:

Are you planning on using the Alzheimer’s Association logo? If so, in what manner? (Please note: It is illegal to use the Alzheimer’s Association trademarked logo without permission.)

Please list all marketing activities planned to promote the event, such as flyers, posters, invitations, paid advertising, press releases, etc.).

Why did you choose the Alzheimer’s Association as a beneficiary of your fundraiser?

Thank you for supporting the Alzheimer’s Association, Central and North Florida Chapter!
Sample Event Budget Checklist  
For Third Party Events

As a courtesy, we offer this tool to help you anticipate the many costs that may affect your fundraising results. While not all of these expenses may apply to your specific event, your review and consideration may help you determine how to reach your fundraising goals.

Decorations - centerpieces, floral and hard décor for background and foreground  $________
Design & Printing - save-the-date cards, invitations, program & auction books, stationery  $________
Entertainment - artists, musicians, DJ, performers, auctioneer, production personnel  $________
Equipment Rentals - tables, chairs, staging, lighting, audio/visual, Podium, backdrops, linen & catering  $________
Facilities - fees, set up/break down, tenting, etc.  $________
Food & Beverages - catering, per-person cost of meals, liquor, gratuities, etc.  $________
Party favors, sponsor recognition & honorary gifts, etc.  $________
Postage – for Invitations, save-the-dates, meeting notices, follow-up mailings  $________
Professional Fees – ex. photography, public relations, bank fees, legal, accounting, etc.  $________
Transportation - related travel and delivery costs  $________
Taxes and gratuities  $________
Misc. other  (office expense, security, parking, etc.)  $________

Subtotal: Divide subtotal by the number of paid guests expected  $________
Add 10% of this total for unexpected contingencies  $________

Total Per Person Event Costs  $________

Total Event Costs  (Cost per person) x (expected number of paid attendees)  $________
This amount should not be more than 30% of expected total revenue  $________

The information contained in this document is in no way meant to be an all-inclusive list of possible fees and expenses for any specific event. The Alzheimer’s Association is not responsible for expenses, fees, gratuities, personal or property damage, weather, acts of nature, or for any harm to any persons or property whatsoever resulting from the production of independent, third party events and activities.
POST-EVENT REPORT

Please return this report, along with your donation check, within 30 days following event execution to the address listed below.

Name of Event: __________________________________________________________

Date of Event: __________________________________________________________

Location of Event: __________________________________________________________________________

Total Revenue: ________________

Total Expenses: ________________

Total Net Donation: ________________

Report Submitted By: __________________________________________________________

PRINT NAME

Signed: __________________________________________________________________________

ALL CHECKS SHOULD BE MADE OUT TO: ALZHEIMER’S ASSOCIATION

Alzheimer’s Association Central and North Florida Chapter
Attention: Cindy Godwin, Director of Development
4237 Salisbury Road, Suite 310, Jacksonville, FL 32216