

The Spartanburg County Foundation



FUNDRAISING
EVENTS

Forms

FUNDRAISING EVENTS FORMS

Contents

➤ Event Checklist	2
➤ Fundraising Event Application (3 pages)	3
➤ Insurance – Special Events Application	6
➤ Estimated Budget	7
➤ In-Kind and Cash Donations	8
➤ Sponsorship Form	9
➤ Silent Auction Bid Sheet	10
➤ Expense Form	11
➤ Independent Fundraising (Upon Request)	12
➤ Running a Silent Auction (Upon Request)	13
➤ Sample Closing Schedule (Upon Request)	16

For the following items, the donor’s copy of the form will serve as their tax receipt. It is therefore critical that the donors receive their copies of these forms as the Foundation **will not** furnish additional receipts for these items. As mentioned earlier, it is the fundraiser’s responsibility to make 3 part carbonless forms.

- Sponsorships, (attached check to sponsorship form when submitting)
- In-kind donations,
- Silent auction proceeds, (attach check to copy of bid form when submitting)
- Tickets to the event. **(amount should be listed on the ticket)**
- In addition, any item purchased that is valued at less than \$75 will not be issued a letter from The Spartanburg County Foundation. The individual can use their check as sufficient back-up documentation for the IRS. The fundraising committee, however, can acknowledge each donation by sending a personal note.

EVENT CHECKLIST

We are providing you with a checklist that needs to be followed to ensure your fundraiser meets our guidelines at the foundation, including those of the IRS and State Laws.

- In the sections of this manual that follow, where you see this symbol you will be asked to submit materials to the Foundation. Each item should be submitted to the Communications Officer at The Spartanburg County Foundation, 424 E. Kennedy Street, Spartanburg, SC 29302

Event Checklist

Date Submitted To the Foundation

Pre-Approval

- Application, budget, and insurance forms _____
- Copies of all promotional materials and media coverage. Prior to its final print for Foundation approval _____
- Original event/dinner ticket and explanation of fair market value determination. _____
- Copies of In-kind Contribution Form(s) (if applicable). _____
- Sponsorship Form (if applicable). _____
- Silent Auction Form (if applicable) _____
- Independent Contractor Agreement (if applicable) _____

During/Post Event

- Completed sponsorship forms (send in with checks) Copy to donor, copy to Foundation, copy for committee _____
- Original receipts & completed Expense Form Including W-9 and proper approval _____
- Completed Contribution form with payment _____
- Completed in-kind contribution forms Copy to donor, copy to Foundation, copy to fund holder _____
- Completed Silent Auction forms (send in with payments) _____
- Reconciliation of your account submitted to The Spartanburg County Foundation _____



FUNDRAISING EVENT APPLICATION

Please complete and submit this application and the estimated budget form to The Spartanburg County Foundation at least three months prior to your event and prior to generating any event materials. You can type your responses directly on this form, then print and mail or send it via email as an attachment. Please submit the complete form to The Spartanburg County Foundation, 424 E. Kennedy Street, Spartanburg, SC 29302. For questions, contact the Donor Services Officer or (864)582-0138.

Fund Name _____

Name of Event _____

Description of Event and its purpose:

Date of Event _____ Estimated Number of Attendees _____

Place (address) _____

One time event / annual event/ or other *(circle one)*
(Explain) _____

Event will include: (Check all that apply)

- Dinner/Meal
- Liquor
- Silent Auction
- Live Auction
- Program/Entertainment *(i.e. speaker, band, tour of facility)*
Please describe: _____
- Sporting event *(i.e. golf tournament, walk-a-thon)*
Please describe: _____
- Any other fundraising activities *(i.e. selling items, selling chances for a game)*
Please describe: _____

NOTE: Gambling activities of any kind (pull-tabs, raffles, etc.) are not allowed.

Fundraising Goal \$ _____ (Net expenses)

Primary Contact person _____

Email _____ Best place & time to be contacted _____

(home) _____ (work) _____ (cell) _____

Address _____

Other Contacts

1. Contact person _____

Email _____ Best place & time to be contacted _____

(home) _____ (work) _____ (cell) _____

2. Contact person _____

Email _____ Best place & time to be contacted _____

(home) _____ (work) _____ (cell) _____

Who will issue approvals? (list two or three primary individuals)

--	--	--

Who will reconcile your accounting records? _____

1. Do any of the above named individuals expect to gain monetarily from conducting the event? Yes No Do any of these persons have connections to a business that will benefit from the proposed event? Yes No
If so, explain. _____

Budget Information

Please attach an event budget, detailing all major categories of expenses and revenues and contact information for all vendors. Proposals will not be processed without this information. A sample budget is available upon request.

Publicity and Promotion

How do you plan to promote or publicize your event? If you plan to mail invitations, issue press releases, print brochures, flyers, or posters, or use radio, television or print ads, please describe below. The Spartanburg County Foundation must review and approve, in advance, all publicity materials.

Agreement Signature

I have read and understand The Spartanburg County Foundation’s Fundraising Policy. I, on behalf of the fundraising group, agree to adhere to all guidelines within this document when conducting a fundraising activity on behalf of a fund of The Spartanburg County Foundation. I understand that failure to comply with the guidelines stated within the Fundraising Policy may result in negative consequences for the fund.

Name (please print) _____

Signature _____ Date _____

Please return this completed application with all requested documentation to:

Donor Services Officer
The Spartanburg County Foundation
424 E. Kennedy Street
Spartanburg, SC 29302
(P) 864-582-0138 (f) 864-573-5378
asmith@spcf.org

Thank you for your efforts to build permanent charitable capital for the community!

Office Approval		
Time of event: _____	Budget: _____	Size: _____
Insurance coverage: <input type="checkbox"/>	Publicity <input type="checkbox"/>	
Authorized Signature _____		

ESTIMATED BUDGET

Example:

Please use the back for additional information or attach your budget to this.

Fund Name _____
(The Spartanburg County Foundation Fund)

Name of Fundraising Event _____

Submitted by _____ Date of Event _____

Total Estimated Gross Revenue

\$ _____

For example:
number.

Please show how you arrived at this number.

100 golfers @ \$100	\$10,000
5 sponsors @ \$1,000	5,000
Misc. donations	250
Total	\$15,250

Total Estimated Expenses

\$ _____

For example:

Please provide cost of item and vendor.

100 rounds of golf @ \$62.50 (Golden Oaks)	\$6,250
75 dinners @ \$15 (Golden Oaks)	1,125
Brochure printing (Copy Center)	500
Postage	34
Door prizes (donated)	0
5 awards for top teams (Pagoda Golf)	500
Total	\$8,409

Fundraising Goal (Revenue minus Expenses)

\$ _____





IN-KIND AND CASH DONATIONS

TAX ID # 57-0351398

Fund Raising
Event: _____

DATE RECEIVED: _____

DESCRIPTION:

DONOR: _____

VALUE: _____

Acknowledgement
by committee: _____ Date _____ By: _____
Committee Member

**In-kind donations are donations which are not cash
(services rendered, merchandise, waiving of fees, etc.)**

Attention Donor:

This is your Official tax receipt. Please keep a copy of this to file with the IRS.

The second and third copy will be given to the Fundraiser committee and The Spartanburg County Foundation respectively.

(Sample)

SPONSORSHIP FORM

(sample)

Sponsorship Level (check one)

PLATINUM SPONSOR - \$25,000

Contributing Sponsor receives: Four (4) rounds of golf (\$ Value)
Four (4) complimentary concert tickets (\$ Value)
One (1) dinner for four (\$ Value)

GOLD SPONSOR - \$10,000

Contributing Sponsor receives: Two (2) rounds of golf (\$ Value)
Two (2) complimentary concert tickets (\$ Value)
One (1) dinner for two (\$ Value)

SILVER SPONSOR - \$1,000

Contributing Sponsor receives: A set of crystal wine glasses (\$ Value)
One (1) complimentary Bowling ticket (\$ Value)
One (1) dinner for two at Pizza Hut (\$ Value)

Name _____ Sponsorship\$ _____

Street Address _____

City _____ State _____ Zip _____

Signature _____ Date _____

Received by _____ Date _____

Fund Name: _____

Event Name & Date: _____

Please retain a copy of this form for your tax records.
For assistance, contact the Donor Services Officer. (864)582-0138.

3-PLY FORM (check below)

Copy to Donor Copy to Foundation Copy to Event Organizer



SILENT AUCTION BID SHEET

Bidding closes at ____ (a.m.) (p.m.)

Fund Name: _____

Event Name & Date: _____

Item _____ Est. Value\$ _____

Description _____

Donor _____ Minimum Bid _____

<u>Name of Bidder</u>	<u>BID</u>	<u>Name of Bidder</u>	<u>BID</u>

Items may be paid for and picked up this evening between ____ (a.m./p.m.) and ____ (a.m./p.m.)

This bid sheet is your receipt, and it constitutes the written disclosure statement required by Section 6115 of the Internal Revenue Code. As a result, please retain this bid sheet for your tax records. You will not receive additional documentation for tax purposes at a later date.

Although a portion of your successful bid may be a deductible contribution for federal tax purposes, the amount that may be deducted is generally limited to the amount by which your bid exceeds the fair market value of the goods or services you will receive in return. The estimated value stated above constitutes the donor's good-faith estimate of the value of the goods or services you will receive.

Successful Bidder _____ Bid\$ _____

Street Address _____

City _____ State _____ Zip _____

Signature _____ Phone _____

3-PLY FORM (check below)

Copy to Donor Copy to Foundation Copy to Event Organizer

EXPENSE FORM

A W-9 Form must be filled out for each vendor. This form can be obtained from the Foundation or by signing onto the IRS website – forms and print a copy.

Fund Name _____ Date _____

Name _____ Daytime Phone: _____

Email _____ Page _____ of _____

Approved by _____
 (Board Chair or Authorized Fund Committee Member)

Special Instructions _____

Expenses to be Reimbursed/Invoices (Bills to be paid):

Note: Independent Contractors will not be paid without a signed Independent Contractor Agreement; all expenses must be accompanied by original receipts.

Payee (name and address) or Organization or Company	Amount
Name:	
Address:	
Purpose:	
Notes:	
SSN# or Tax ID#:	
Name:	
Address:	
Purpose:	
Notes:	
SSN# or Tax ID#:	
Name:	
Address:	
Purpose:	
Notes:	
SSN# or Tax ID#:	
Name:	
Address:	
Purpose:	
Notes:	
SSN# or Tax ID#:	
Name:	
Address:	
Purpose:	
Notes:	
SSN# or Tax ID#:	

Please make a copy of this form and the receipts/invoices being sent for your files, and then mail this form with the original receipts/invoices to: The Spartanburg County foundation, 424 E. Kennedy Street, Spartanburg, SC 29302, telephone (864) 582-0138. Contact Susan Mullins at smullins@spcf.org for any questions or concerns.

INDEPENDENT FUNDRAISING

This is the simplest method for conducting fundraising activities. Fundraising is conducted by an individual, a group of people, or an organization without the endorsement, involvement or mention of the County Foundation or the Fund held at the County Foundation. Generally, the person or group plans and executes a fundraiser (for example: dinners; golf tournaments; walk-a-thons; auctions; sales of products or services; requests for money from individuals or organizations through mailings, advertisements, or oral solicitations) and then makes one lump sum donation to the Fund. Neither The Spartanburg County Foundation nor the name of the Fund may be used in connection with the event or activity. Unless the event is sponsored by another nonprofit organization which accepts and acknowledges the contributions, individual donations are not tax deductible to the donor. The end charitable purpose of the fundraising activity can be mentioned (i.e. child abuse prevention, charitable works in the community, scholarships, etc.), but the Foundation or specific fund name cannot be used.)

Note on Tax Deductibility

Contributions to a fundraiser are only tax deductible when they are received and acknowledged directly by a qualified nonprofit organization. Depending on the event, tax deductibility may or may not be a motivating reason for donors to participate. We have often found that donors who participate in fundraising events are not doing so to receive a tax deduction. Donors often believe in the purpose of the fundraiser and will make a contribution regardless of the tax benefits to themselves.

Guidelines for Independent Fundraising

1. A person or group plans and executes a fundraising event. Event organizers may state that proceeds benefit the general purpose of the Fund, but may not use The Spartanburg County Foundation name, logo, tax exempt number, or name of the Fund in connection with the event.
2. The planning group is responsible for obtaining and paying for any necessary insurance, permits, licenses, approvals, etc. Events or activities that include raffles or other games of chance are regulated by state and local governments and must be specifically reviewed, authorized and registered by the appropriate branch of government. Note that there are specific regulations regarding raffles and that there is no charitable deduction for items purchased at auction, nor for raffles.
3. Fundraising events often require certificates of insurance or signed contracts. When the event is sponsored by a person, group, or other organization, the name of the County Foundation or the Fund may not



appear on any contract or agreement. (Note: volunteers must not sign contracts obligating The Spartanburg County Foundation.)

4. Individual participants in the event (ticket purchasers, sponsors, golf players, etc.) make their payments to the organizing person or group, not to the Spartanburg County Foundation or the Fund. The organizers may record the contributors' names and addresses and may provide a courtesy acknowledgement. The acknowledgement letter must not include any language stating that the letter serves as an official receipt for IRS purposes or include any reference to tax deductibility or to the contribution being made to The Spartanburg County Foundation or to the Fund.
5. The planning group pays expenses and sends the net proceeds from the fundraiser (cash or check only) to The Spartanburg County Foundation for addition to the Fund. The SPCF records the gift as coming from unnamed "third party donors."
6. It is possible for a donor to make a direct, tax-deductible gift to the Fund without participating in the fundraising activity. In that instance, he/she makes the check payable directly to the "Fund Name" at the Spartanburg County Foundation, marks the check "direct contribution/no benefits received," and sends it directly to the fund of The Spartanburg County Foundation. If the donor has not received any goods or services (dinner, raffle tickets, round of golf, etc.) in exchange for the donation, he/she will receive an individual gift acknowledgement letter from the Spartanburg County Foundation indicating that the gift is tax deductible.

Summary of Independent Fundraising

Independent fundraising, with no mention of the Fund or The Spartanburg County Foundation, is the simplest method for those interested in holding special events such as golf tournaments, dinners, drawings, etc. The Spartanburg County Foundation will not have to approve the fundraiser, records will not have to be turned in to the office, and The Spartanburg County Foundation will not need to approve all promotional and printed material in connection with the fundraiser. The individual contributor's gift is usually not tax deductible. If you plan to do independent fundraising, please clear your plans with The Spartanburg County Foundation as a courtesy and to ensure adherence to proper procedures.



RUNNING A SILENT AUCTION

The following section provides some suggestions for ensuring your silent auction runs smoothly and efficiently.

Staffing

Volunteers are required throughout the entire silent auction to ensure an orderly flow. Tables must be staffed during the auction to monitor the bidding. An absolute presence is mandatory during the closing of the tables and again at the end of the evening for redemption of purchases.

An extensive list of volunteers will enable you to devise a shift system of a half an hour or hour working schedule. This revolving system will allow people to enjoy the evening while fulfilling their commitment to the auction's operational success. Consider encouraging faculty or "career" individuals who may wish to participate but have limited available time.

Bid Sheets

Depending on the size of your table, consider having two volunteers available during the silent auction. Responsibilities include ensuring that:

- All items and bid sheets are clearly marked and visible.
- Writing instruments are always available.
- Bid sheets have sufficient room for additional bids.
- Incremental bids have been correctly entered.
- Guaranteed bid sheets, which have been completed, are turned over to prohibit any further bidding.
- Closing times are clearly adhered to and the final moments are handled with finesse and tact.
- Final bids are accurate, comply with regulations, and are clearly legible.

Closing Options

In all silent auctions there are options as to when tables are closed and bidding tabulated:

- Close all tables at intervals prior to dinner or,
- Close tables at intervals during dinner or,
- Close tables at intervals during the live auction.

The operative word in all closing variables is "interval." Closing all tables at the same moment prohibits multiple bidding. People customarily bid on more than one item and want to be present to place that final dollar amount. Obviously, participants cannot be in two or three places at the same time. Every opportunity must be given to increase revenue.



Publish Closing

Establish and publicize all closing schedules prior to the auction. Publish it in the catalog, have it clearly visible on a large sign during the auction, and NEVER waiver from the predetermined schedule. Ten minutes is sufficient time between table closings. Warnings and closing times should be clearly announced throughout the event.

Final Gong

When the final bell has rung, immediately remove all bid sheets. Do not permit any bidding after the table closes, even if the individual is a VIP. Further bidding will create an atmosphere of ill will and favoritism. Senior committee members should be available to prevent any bidding problems.

To make closing quick and efficient, cover all bids with a tablecloth until bidders leave the area. Once the crowd has exited, bid sheets can be collected and tabulated in an orderly fashion.

Run Off

If two individuals are heavily involved in the bidding on an item when the table is closed, this situation calls for tact and diplomacy to satisfy everyone. One suggestion is for a senior committee member to take the two bidders aside and conduct a "live" bidding until one is a winner. The end result is maximum contribution to the benefit without bad feelings resulting among individuals. Committee members should also be aware if another award of the same item could be offered. If a multiple item is a possibility, permit each contesting bidder to obtain the object at the same price.

Clearly publicize the "Run Off" option prior to the silent auction. Make the possibility of this happening known to all participants; "no surprises" is an excellent rule of thumb. Never be accused of changing the rules mid-game.



SAMPLE CLOSING SCHEDULE

TIME	DESCRIPTION OF ACTIVITY
8:00	Prepare to close Tables #1 & #2 Issue 5-minute and 2-minute warnings
8:05	GONG! Close Tables #1 & #2 Collect all bid sheets and arrange in numerical order Take to Cashier #1
8:05	Prepare to close Tables #3 & #4 Issue 5-minute and 2-minute warnings
8:10	GONG! Close Tables #3 & #4 Collect all bid sheets and arrange in numerical order Take to Cashier #2
8:10	Prepare to close Tables #5 & #6 Issue 5-minute and 2-minute warnings
8:15	GONG! Close Tables #5 & #6 Collect all bid sheets and arrange in numerical order Take to Cashier #3
8:15	Prepare to close Tables #7 & #8 Issue 5-minute and 2-minute warnings
8:20	GONG! Close Tables #7 & #8 Collect all bid sheets and arrange in numerical order Take to Cashier #1
8:20	Prepare to move Special Table Explain that bidding will continue during dinner Keep sheets in numerical order and transport to dining area Post Special Table sheets in dining area
8:55	Issue 5-minute and 2-minute warnings
9:00	GONG! Close Special Table Collect all sheets and take to Cashier #2