



## Third Party Guidelines for Events held to benefit Cancer Services

Thank you for your interest in planning an event to benefit Cancer Services of Greater Baton Rouge (CSGBR). We receive numerous inquiries each year from individuals, families and organizations that want to hold their own fundraising events in support of our mission to improve life for those living with cancer.

These community events are held independently from CSGBR's Development Office and are run by interested volunteers. We recommend considering a few questions before holding your event:

- Does this event support the mission and image of CSGBR?
- Does this event have a realistic budget, timeline, and plan?
- What is the projected gross revenue and gross expenses for the event?
- Who will oversee and implement the event? Will there be other members of the committee?
- Are the funds raised from the event to be restricted for any particular purpose?

After carefully considering the above questions, we request that you complete an Event Proposal Form and submit it to the Development Office. We also recommend that you take a moment to review our Community Event Policy. This policy outlines what CSGBR is able to assist you with regarding your event as well as explains our limitations. For instance, CSGBR can offer event planning expertise and advice and promote the event and/or publicize your event's donation by publishing the event name and details on our website and quarterly newsletter. **CSGBR however does not advance monies, provide donor lists, or solicit sponsorship revenue for community events.** We state this information in advance so that there are no disappointments or misunderstandings with regard to our ability to participate with you and support your fundraising event.

**A Few Key Points:** The policy also provides guidelines for using CSGBR's name or logo in association with your event, expectations/requirements for promotional materials, and also sponsorship and financial contribution guidelines:

- Our Development Office needs to give final approval before the event in order for Cancer Services' name or logo to be used in any event promotion that uses our name/logo.
- We also need to review and approve all promotional materials, including, but not limited to print and electronic media advertisements, letters, news releases and promotional packaging that use the name and/or logo of Cancer Services, prior to production, printing and publication of such materials.
- To help us steward our relationships in the community and eliminate dual solicitations, we kindly request that you provide a list of potential sponsors (including in-kind donors).
- Event organizers agree that the total cost of the event will not exceed more than half of the total revenue the event generates (i.e. if the event is projected to raise \$10,000 in total revenue, then the costs cannot be more than \$5,000. Therefore, the minimum net revenue is \$5,000).

We hope to hear from you soon about your idea for an event to help improve life for those living with cancer. If you have any questions, please contact Connie Caldwell at (225) 927-2273 or via email at ccaldwell@cancerservices.org.

## Community Event Policies & Procedures

**Community fundraising events should fit the mission and promote the appropriate image for Cancer Services of Greater Baton Rouge (CSGBR).**

### **Our Mission**

To improve life for those living with cancer.

### **Permission**

CSGBR retains a fiduciary duty to ensure that our name is used properly, that the funds are being handled and accounted for in a responsible manner, and the fundraising is being conducted in a manner that is consistent with our mission and public image.

- If name/logo is to be used, all fundraising events for CSGBR require written permission from the CSGBR Office of Development in advance. You must receive approval of your event proposal **prior** to public announcements or event promotions using CSGBR's name and/or logo.
- Fundraising events must comply with all relevant state and federal laws.

### **Event Timing**

It is the policy of CSGBR Office of Development to maintain a list of all event and other fundraising efforts benefiting our agency. This includes agency-planned activities and events sponsored at-large by others in the community.

- It is the responsibility of the event coordinator to approve the fundraising event date with the CSGBR Office of Development to ensure no duplication of event or event dates. This allows for sufficient time between events to maximize support, enthusiasm and attendance at your event.

### **Event Promotion & Logo Usage**

- CSGBR Office of Development must review all promotional materials (including press releases, public service announcements, scripts, posters, brochures, websites, etc.) before they are used.
- CSGBR may promote the event, when appropriate, through: Our website (with a link to the event's/organization's website, if appropriate); Our quarterly newsletter that reaches over 4,000 clients, volunteers and donors; Our semi-annual newsletter that reaches over 12,000 clients, volunteers and donors

### **Event Language**

- Any promotional materials must be clear that your event is raising funds that will benefit CSGBR.
- Any promotional materials must properly characterize the use for which the donation will be made. For example, "*Proceeds benefit Cancer Services of Greater Baton Rouge.*"

## **Financial Guidelines**

- You should notify your event donors of the money raised by your event that was donated to CSGBR. Event thank you's are a great way to let people know the great success your event had.
- According to Charities Review Council Smart Giving: How Much Should A Charity Spend on Programs *"Although each charity is unique in its cost allocation and not limited legally, the Council's standard "Use of Funds" recommends that charities spend at least 70% of their total annual expenses on their stated programs, and not more than 30% on administration and fundraising combined. Donors have a right to expect that most of their gifts will be used for the cause to which they are donating."*
- The only credit cards processed by Cancer Services will be with CSGBR credit card machines operated by a Cancer Services employee.
- Within 30 days after the last day of the event, please send a check made payable to:  
Cancer Services of Greater Baton Rouge  
550 Lobbell Ave  
Baton Rouge, LA 70806

## **Sponsorship**

- CSGBR will not solicit sponsors or sell tickets for your fundraising event and does not provide any donor or patient family contact information.
- Printed materials and other information should state, *"Proceeds will benefit Cancer Services of Greater Baton Rouge."*
- Please provide a list of all *potential* sponsorship contacts (including all potential in-kind donors) to the CSGBR Office of Development. This will allow us to provide you information on their current support of the agency and help us to be good stewards of our longstanding relationships within the community.
- CSGBR will not seek or accept contributions, sponsorships or endorsements from any person, business, association or other organization which manufactures, or which, as its principal business, distributes, sells, produces or promotes tobacco or tobacco related products or any other products that cause or contribute to cancer or cancer-related illnesses. This restriction also applies to your committee or organization.

## **In-kind Sponsorship**

- In-kind sponsorship is defined as a donation of a product or service, such as printing or silent auction items.
- CSGBR will not solicit in-kind sponsors for your fundraising event.
- The value of in-kind sponsors should not be included in your total event revenue, but should be acknowledged when reporting to the CSGBR Office of Development.

## **Tax Receipts and Donor Acknowledgement**

- See attached Form A that explains the donor information you should retain for your records.
- Please note that in-kind sponsors and cash sponsors need to be differentiated. Two separate databases need to be created.
- According to Charities Review Council Smart Giving: *“If you attend a charitable event, you may be able to receive a deduction, but not for the entire price of the event. You will NOT receive charitable deductions for the value of any goods or services that you receive, such as dinner or entertainment. The organization hosting the event should be able to identify the exact value of benefits you receive. After deducting that amount, the rest of the amount you paid for your ticket is deductible.”*

## **Cancellation, Liability & Changes**

- If circumstances warrant, CSGBR may at any time through any of its officers, the executive director, or the Office of Development, direct you to cancel the event. You hereby agree to cancel the event, if so directed, and further agree to release the agency, the Office of Development, and its officers, directors, and employees from any and all liability and connection to such action.
- The sponsors agree to indemnify and hold harmless CSGBR and all its officers, directors, and employees from any and all claims and liabilities in any way related to the event.
- You must advise CSGBR’s Office of Development of any changes in your fundraising event.

## **What We Can Do For You**

- Offer event planning expertise and advice.
- Approve the use of the agency’s name and/or logo.
- Provide a letter of support to be used to validate the authenticity of the event and its organizers.
- Provide limited existing agency materials for your event, such as brochures.
- The Office of Development can acknowledge your event’s donation by publishing the event name, event description, locations and contact information on the agency website, quarterly or semi-annual newsletters.

## **Things to Remember**

- Complete and sign the event proposal form at least 2 months prior to your event.
- Establish goals that are realistic and measurable.
- Identify your audience.
- Plan a budget. Identify sources of income and all expenses. If you keep costs down, you’ll generate a larger donation – something everyone will feel good about.
- Promotion and publicity – You need to be certain that all promotional and publicity material is approved by the CSGBR Marketing Associate so that you are using the name, logo, and charitable language correctly.
- Collect the funds and submit the proceeds to the CSGBR Office of Development. We ask that all funds be forwarded within 30 days of the conclusion of the event. The list of event revenue and expense totals must also be included.
- **Until written permission is received, the name “Cancer Services of Greater Baton Rouge” and/or its logo cannot be used for any purpose.**

*Thank you* again for your interest in planning an event to benefit Cancer Services of Greater Baton Rouge. Philanthropic contributions such as yours help us to meet the critical needs of cancer patients in our community. A Cancer Services development office representative is always available for questions or guidance. Thank you!

## **Community Event Agreement**

**Please return this signed document together with your completed Event Proposal Form to the CSGBR Office of Development for approval and official sanction by the Development Committee prior to distribution of your solicitations, invitations, and public announcements.**

**If approved by Cancer Services of Greater Baton Rouge, this agreement will become effective and your committee or organization will be bound by its terms and conditions in accordance with applicable Louisiana law.**

We encourage you to contact the CSGBR development office at (225) 927-2273 if you have any questions about these policies and procedures or your obligations.

Please keep one copy of these policies and procedures for your reference and return the original signed copy with your completed Event Proposal Form to: Cancer Services of Greater Baton Rouge, Office of Development, 550 Lobdell Ave, Baton Rouge, Louisiana 70806.

_____ Name of Sponsoring Organization	_____ Address	_____ Phone
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_____ Signature of Authorized Representative	_____ Event Title	_____ Date
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**CSGBR Office of Development Use Only**

Date Approved by CSGBR Office of Development \_\_\_\_\_

Signature of CSGBR Director of Development \_\_\_\_\_

Signature of CSGBR Executive Director \_\_\_\_\_

Reason(s) for non-approval of this event \_\_\_\_\_

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\_\_\_\_\_

## **Form A – Donation Records**

The following information should be gathered from all event sponsors and in-kind donors. One copy should be retained by the event committee and one given to CSGBR.

### **SPONSORS:**

- Company/Organization/Individual(s)
- First and Last Name (company/organization contact name)
- Address
- City
- State
- Zip
- Phone Number
- E-mail Address
- Donation Amount
- Tax Deductible Amount

### **IN-KIND SPONSORS:**

- Company/Organization/Individual(s)
- First and Last Name (company/organization contact name)
- Address
- City
- State
- Zip
- Phone Number
- E-mail Address
- Item Donated
- Value
- Tax Deductible Amount