



THIRD PARTY FUNDRAISER GUIDELINES

The Lupus Foundation of America, North Carolina Chapter, Inc. (LFANC) is part of a national force devoted to solving the cruel mystery of lupus, and is dedicated to improving the quality of life for all people affected by lupus through programs of research, education, support, and advocacy. Pursuing our mission requires significant financial resources – a substantial portion of which are obtained through Third Party Fundraisers for which the organization is extremely grateful. The following are the LFANC’s guidelines for the conduct of such Third Party Fundraisers, which all organizers are expected to follow.

“THIRD PARTY FUNDRAISER” DEFINED

LFANC defines a "Third Party Fundraiser" as any fundraising activity by a group or individual other than LFANC, with all or a portion of the proceeds being dedicated to LFANC.

Third Party Fundraisers may include two types:

- Non-Affiliated - This type is a non-lupus related event, activity or program where the organizer has chosen to give a portion or all of the proceeds to the LFANC.
- Special Interest - This is the organizing of an independent event, activity or program specifically designed to raise funds for lupus, with all net proceeds going to benefit the LFANC. This includes events, activities, and programs organized by individual walkers and by walk teams in connection with the annual Walk to End Lupus Now.

APPROVAL

For all Third Party Fundraisers not organized by individual walkers or by walk teams related to the Walk To End Lupus Now, a Third Party Fundraiser Application must be submitted for review and approval before any advertising or publication can take place which states the LFANC as the beneficiary. Each such fundraiser will be reviewed on a case by case basis, and a new application is required each year for annual fundraisers.

Third Party Fundraisers organized by individual walkers or by walk teams related to the Walk To End Lupus Now are not required to complete a Third Party Fundraiser Application; however, they must comply in all other respects with these Guidelines.

PROHIBITED ACTIVITIES

The LFANC reserves the right to decline association with any Third Party Fundraiser when it believes that such association may have a negative effect on the credibility of the LFANC. This right includes, but is in no way limited to, the prohibiting of the Third Party Fundraiser’s usage of the LFANC’s name, logo, and any other information or image which would tend to associate the Third Party Fundraiser with LFANC.

Third Party Fundraiser events shall not include (nor shall they be conducted at, as part of, or in connection with any other event which includes): (1) the commission of any criminal act(s) of any kind; (2) nudity, stripping, and/or sexual activity; or (3) the possession, use, sale, or distribution of any illegal drug(s). Funds generated through Third Party Fundraisers involving any such conduct will not be knowingly accepted by LFANC.

PROMOTION

Third Party Fundraisers must be promoted and conducted in a manner to avoid statement or appearance of LFANC endorsing any product, firm, organization, individual or service.

The LFANC encourages all Third Party Fundraisers to establish a timetable and action plan a minimum of three months before the event. An LFANC staff person can provide guidance to aid in the development of committee structure, marketing and deadlines.

If the official logo of the LFANC is used in conjunction with a Third Party Fundraiser, it must be used appropriately and may not be altered in any way. Any use of the LFANC logo must adhere to the LFA's Official Branding Guidelines, a copy of which is available upon request. Authorization to use the LFANC logo for a Third Party Fundraiser will automatically terminate at the conclusion of the Fundraiser.

Promotional materials (including, but not limited to, advertisements, letters, brochures, flyers, websites, social media, and press releases) will be the responsibility of the Third Party Fundraiser's organizer; however, the LFANC reserves the right to review and approve all marketing materials bearing the LFANC's name or logo must be reviewed and approved by the LFANC prior to production or distribution. Promotional materials cannot be purchased with LFANC funds, but rather should be the result of underwriting or sponsorship related to the Third Party Fundraiser.

ADDITIONAL SUPPORT

Based on audience of the fundraiser, number of participants, and inventory, the LFANC may be able to provide materials such as educational materials or signage. Organizers must submit a request for these materials no less than three weeks prior to the fundraiser.

Depending on timing and location of a fundraiser, LFANC may be able to provide the presence of volunteers or staff, but it is not guaranteed. Request for such representation must be made at the time of application.

LIABILITY

The LFANC is not financially, legally, or otherwise liable for any aspect of a Third Party Fundraiser, including its planning, promotion, staging, or conduct.

All Third Party Fundraisers must strictly adhere to all applicable local, state, and national laws and regulations, including those concerning the distribution and usage of alcoholic beverages. Third Party Fundraisers should not include alcohol unless: (1) alcohol is believed to be critical to the success of the fundraiser (such as for a beer or wine tasting); (2) proof of age is required and signs are conspicuously posted to that effect, with no underage persons being permitted to serve, consume, or possess alcohol; (3) alternative means of transportation are available to attendees of the Third Party Fundraiser; and (4) all other applicable laws are strictly observed. Third Party Fundraisers should also adhere to the LFA's "Best Practices on Serving Alcohol at Foundation Related Activities," a copy of which is available upon request.

Third Party Fundraiser organizers should have participants complete a waiver for release from liability, which shall expressly include LFANC as a released party. If an organizer does not have their own waiver language, the LFANC can provide a sample upon request.

All organizers, vendors, hosts, and others involved in planning, promoting, and conducting the Third Party Fundraiser should have appropriate liability and property insurance in place at all times while associated with the Third Party Fundraiser.

ACCESSIBILITY

All Third Party Fundraisers should be accessible to people with disabilities, and should take place at a location that meets ADA regulations. Organizers of the Third Party Fundraiser should make advance arrangements for any special accommodations needed by those in attendance, including any volunteers and/or staff.

REVENUE GENERATION

All promotional materials must clearly state the exact percentage of proceeds and/or the portion of the ticket price that will benefit the LFANC. (Example: A promotional piece should not just state, “Benefitting the Lupus Foundation of America, NC Chapter”, but rather should say, “100% of net proceeds benefitting the Lupus Foundation of America, NC Chapter” or “10% of all sales will be donated to the Lupus Foundation of America, NC Chapter”.

For Special Interest Events, 100% net (minus fundraiser expenses) income must be remitted to LFANC within 45 calendar days after the conclusion of the Third Party Fundraiser.

For Non-Affiliated Third Party Fundraisers, the income percentage stated in the approved Third Party Fundraiser Application should be remitted to LFANC within 45 calendar days after the conclusion of the Third Party Fundraiser. LFANC reserves the right to make exceptions to this requirement depending on the magnitude of the event or other factors which the LFANC determines provide a genuine benefit to LFANC through its association with the fundraiser. When remitting final income owed to the LFANC, a complete accounting of all funds collected and expenses related to the event must be included. Failure to include could jeopardize future partnerships.

TAX ISSUES

The Lupus Foundation of America, North Carolina Chapter, Inc. has applied to and been approved by the IRS as a charitable (qualified) organization as defined by Internal Revenue Code Section 501 (c)(3) meaning that contributions to the LFANC qualify for the maximum charitable contribution deduction under the Internal Revenue Code. **Please note:** Contributions that are made payable to an organization conducting a Third Party Fundraiser (rather than made payable to LFANC directly) generally will not be treated as a charitable contribution for tax purposes unless that organization is itself approved by the IRS as a charitable (qualified) organization; please consult your tax professional for additional guidance.

If you have additional questions regarding the LFANC’s Third Party Fundraiser Guidelines and application process, contact our office at info@lupusnc.org or (877) 849-8271.