



## ***Third-Party Fundraiser Event Policy***

Thank you for being interested in organizing an event to benefit United Ability! By supporting our mission, you are helping us provide empowering, life-changing services and support to individuals with a disability.

To help ensure the success of your event or fundraising effort, United Ability has established policies that will assist you as you plan and carry out your event. Please take a moment to read these before committing to holding an event for United Ability.

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### ***The Process***

Individuals, companies, and groups interested in organizing an event are required to submit the attached *Third-Party Fundraiser Event Application*.

The application will be reviewed by United Ability's Chief Executive Officer, with a final review completed within seven (7) working days. A staff member will contact you regarding your application status and seek clarification on aspects of your application if needed.

If you have any questions after reading the third-party event policies or application, please contact United Ability at 205.944.3907.

### **General Policies**

- Individuals, companies, and groups organizing a third-party fundraising event that benefits United Ability should be mindful of the organization's mission, vision, and values and should not include any activity that would potentially detract from these core principles or jeopardize the organization's reputation as a qualified public charity. These are defined below:
  - *Our Mission:* United Ability provides innovative services connecting people with disabilities to their communities and empowering individuals to live full and meaningful lives.
  - *Our Vision:* United Ability envisions a world where disability is neither defining nor limiting.
  - *Our Values:*
    - *Empowerment*
      - Everything we do is based on a central belief in the potential of others.
    - *Integrity*
      - We value our history and reputation and are committed to continuing the legacy of excellence that has been our standard for the past 75 years.

- *Needs of Our Community*
  - We are working towards the betterment of our community by giving people the services they want in order to meet their most critical needs.
- *Quality*
  - We provide services that are geared towards the satisfaction n of our program participants and that get realistic, measurable outcomes.
- *Commitment*
  - As an organization and as individuals, we are dedicated to the children, adults, and families we serve.
- *Dependability*
  - We pledge to be here for those who have placed their trust in us and for those who rely on us for support.
- *Innovation*
  - We know that we must break new ground in the ways in which we provide services in order to affect meaningful change in the future.
- Event organizers must submit a third-party event application at least 30 days prior to the event. Larger events may require six (6) months or one (1) year advance notice.
- All fundraising events contributing to official United Ability's program or services must have written approval by United Ability's Chief Executive Officer and must be reapproved each year if the event becomes an annual fundraiser.
- The use of any of United Ability's brand, logo, or name requires written authorization from the United Ability staff member assigned to the event, and all promotional material must be approved before use. Unauthorized use may result in legal action.
- Fundraising events must comply with all relevant state and federal laws and IRS regulations related to 501(c)(3) non-profit organizations.

### **Financial Policies**

- Events must be financially self-sustaining without any financial risk or financial contribution from United Ability.
- The total expense for the event should not exceed 30% of the total amount raised.
- If event expenses are greater than the total collected, the event organizer is responsible for payment of additional expenses.
- Event organizers must provide a written and detailed summary of all expenses along with the donation made payable to United Ability within 60 days after an event.

### **Sponsorship Policies**

- Sponsors for any fundraising event must be pre-approved by United Ability.
- Organizations, groups, or businesses that may compromise the public image of United Ability or conflict with the mission, vision, and values, may not be major or presenting sponsors of fundraising events. In addition, they may not provide their products or services in exchange for donations, advertising, or other event exposure claiming affiliation with United Ability.
- United Ability or any member of United Ability cannot act as an agent on behalf of the soliciting sponsor for third-party fundraising events.

## **Donation and Tax Policies**

- United Ability will accept in-kind donations, provided they are approved in advance by the United Ability staff member assigned to the event.
- United Ability's sales tax exemption cannot be extended to any event.
- If donations are collected at the event and subsequently donated to United Ability in a single sum, only the individual or organization whose name appears on the check will receive tax benefits for the donation. Donors giving in this circumstance should be made aware that their gift will not be acknowledged as a separate tax-deductible donation by United Ability.

## **Cancellation Policies**

- Event organizers must advise United Ability of any changes, setbacks, or cancellations of the event.
- If circumstances warrant, United Ability may choose to opt out of being the event's beneficiary at any time with no obligation.
- United Ability may also direct the event organizer to cancel the event, if deemed necessary by the organization, with no penalty to United Ability.
- The event organizer agrees to release United Ability from all liability for such actions.

## **What United Ability Can Do**

- Assign a United Ability staff member to each event upon receipt of the application to serve as the lead contact.
- Provide applicable United Ability logos in electronic format for event planning and advertising.
- List events on the United Ability website and if publication time allows mention events in United Ability's internal communications.
- Provide pre-produced United Ability materials for event usage.

## **What United Ability Cannot Do**

- Release any mailing lists, including donors, program participants, volunteers, employees, or other confidential resources.
- Fund any event or reimburse for event expenses incurred. It is the responsibility of the event organizer to pay for and obtain all necessary licenses, contracts, or permits.
- Guarantee event promotion in United Ability publications, on United Ability's website, or any other internal communications.
- Sell tickets prior to or during any event.
- Guarantee United Ability staff presence or participant family attendance at any event.
- Offer financial services for any event.
- Process credit cards at any event; however, event participants can be directed to the United Ability website to make secure online donations.



## Third-Party Fundraiser Event Application

*Please complete and email to [development@unitedability.org](mailto:development@unitedability.org).*

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### 1. Event Organizer Contact Information

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First Name                      Last Name                      Organization (if applicable)

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Address                                              City, State                      Zip

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Phone                                              Email

### 2. Event Details

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Name of Event                                              Event Location

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Event Date                                              Event Time(s)

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Event Description

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Why did you choose United Ability as the beneficiary of your event?

How do you plan to publicize this event? Please list planned usage of printed materials, social media promotion, etc.

Is this event open to the public?

Y

N

Would you like a United Ability representative to attend?

Y

N

What are your needs from United Ability?

If applicable, list the event's insurance provider name and policy type/information. (A copy of necessary insurance should be provided to United Ability at least 15 days prior to the event.)

**3. Funding and Donation Information**

Estimated Expenses

Estimated Revenue

Estimated Proceeds/Donations

Please list anticipated sponsors/underwriters of the event.

Please list the mode of raising funds for the event.

Are there beneficiaries other than United Ability? If so, please name and describe the extent to which they will benefit.

**4. By submitting this application, you are acknowledging that:**

- All events to benefit United Ability must receive approval by United Ability's Chief Executive Officer prior to the event or event promotion.
- United Ability must approve all publicity and promotional materials for proposed event(s) that include United Ability's name or logo before they are released. Please forward all materials to United Ability's Development Staff prior to publicizing the event.

Signature

Date

Applicant has read the *Third-Party Fundraiser Event Policy* and agrees to abide by it. United Ability is not liable to any party or vendor for any fees, costs of payments of any kind, and Applicant agrees to indemnify and hold harmless United Ability against any claims by third parties or vendors for such fees, contracts, costs, or payments incurred pursuant to this agreement.