



# Third-Party Fundraising Policies & Procedures



## Definition of Terms

For purposes of this document, “you” refers to the business, organization, group or individual sponsoring or holding an event. “STARability,” “we,” “us,” and “our” refers to STARability Foundation.

## Policy Statement

The STARability Foundation must protect its name, reputation and standing in the community. To that end, organizations or individuals wishing to raise funds for STARability must adhere to all fundraising regulations from the Internal Revenue Service and STARability. Events should complement the mission and image of STARability. Companies that conflict with the mission or values of STARability may not sponsor events. Sponsorship by companies with products or services that do not support the health and well-being of people with disabilities will be discouraged.

STARability may direct the organizer to cancel the event if any of the policies and procedures contained herein are not followed.

## Getting Started - Guidelines & Policies

Thank you for contacting the STARability Foundation regarding your upcoming event. Your efforts to transform the lives of individuals with disabilities through social, vocational and educational connections to the community, while strengthening awareness and respect for individual abilities, are greatly appreciated. Please take a moment to read the guidelines below and fill out the application so that we may provide:

- Advice on event planning
- Tax receipts to donors who make checks payable to “STARability Foundation”
- Advertising and promotional support, as appropriate

Please review the following fundraising guidelines and policies prior to submitting your event application.

## Approval Process

You must complete and submit your third-party fundraising application to STARability no less than 60 days prior to the proposed event. Approval must be received before advertising is permitted.

- Applications are one-time only. If this is a recurring annual event, a new application will need to be submitted and approved each year.
- STARability reserves the right to deny any application. Reasons for denial of application include but are not limited to: 1) does not support the STARability mission or does not project a positive image for STARability; 2) no system to ensure the accountability of funds raised; 3) the proposal would conflict with existing philanthropic relationships; 4) the project would conflict with a marketing or public relations campaign; or 5) the proposal is considered unethical or inappropriate.
- You must notify STARability if another organization will benefit from this event/promotion.
- All sponsors need to be disclosed to STARability. If your event includes soliciting local businesses for cash or in-kind support, please include your prospect list to ensure solicitations do not conflict



with existing relationships or development plans.

- STARability reserves the right at any time to revoke an approved event's status if the event violates these third-party fundraising policies.
- In no case will STARability provide the names or contact information of our individual or corporate donors.
- You may not use STARability's name or logo or otherwise indicate to the public that an event is for the benefit of STARability without prior written consent from STARability's executive director, chief philanthropy officer, director of communications or events & marketing manager.
- You may not make public announcements or promote the event until you receive written approval of your third-party fundraiser application from us.

### Marketing & Promotion

- Upon application approval, permission will be granted for the use of STARability's logo; however, promotional materials will need to be preapproved, and the logo cannot be used for any other purpose other than what is described in the third-party fundraising application. The logo cannot be altered in any way.
- It must be clearly stated on all promotional materials that the event is "In support of the STARability Foundation" or "Proceeds benefit the STARability Foundation" and the STARability logo. Nowhere can it state that STARability is a sponsor, co-sponsor or producer of the event.
- When referencing the STARability Foundation in promotional materials, please reference us by our full name. Referencing us as "STARability", "StarAbility" or "Starability" instead of "STARability Foundation" is incorrect.
- As appropriate and approved, STARability will include the third-party event in its marketing efforts.
- STARability must review and approve all promotional materials—including but not limited to advertising, letters, brochures, flyers and press releases—prior to production or distribution.

### Liability

- The STARability Foundation is not responsible for any injuries, damages or theft sustained by event coordinators, volunteers, participants or any other individuals related to a third-party event. We cannot provide liability insurance or coverage for third-party events.
- Events and event organizers must comply with all local, state and federal laws and obtain any necessary permits or licenses.

### Expenses & Income

- Financial accounts set up in the name of STARability are not permitted.
- STARability cannot make any investment, pay for or reimburse any expenses incurred as a result of a third-party event.
- As a fundraiser being promoted as benefiting STARability, all proceeds (net revenue) after deducting expenses must be sent to STARability. A paper donation form will be provided.
- If you are deducting expenses before sending net proceeds to STARability, you may not state or imply to your donors that any funds given to you are tax-deductible. A donation solicited on our



behalf is fully tax-deductible only when it is made directly and entirely to STARability.

- Any form that attempts to solicit a contribution to STARability must include our solicitation for

contributions disclaimer: STARability Foundation Inc. is a private, nonprofit 501(c)(3) corporation

registered with the IRS, Registration number CH172, and receives 100% of all donated funds. A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling toll-free 1-800-435-7352 within the state or online at [freshfromflorida.com](http://freshfromflorida.com).

Registration does not imply endorsement, approval, or recommendation by the state.

- STARability's Federal Tax ID is 59-2516162

### Contributions & Funds Raised

- Checks made payable to "STARability Foundation" must be sent immediately following the event to:

STARability Foundation

Attn: Development Department

720 Goodlette-Frank Rd. N., Suite 400

Naples, FL 34102

- Only checks made payable to "STARability Foundation" will be provided with a tax-receipt.

Donations made directly to an event or event host will not receive a tax deduction from the STARability Foundation.

- If cash donations are taken (which is discouraged) and donors request acknowledgement of their gift for tax purposes, the following legible information must be collected and reconciled with the proceeds given to STARability: name, address, amount of donation and date given. Collection of information is the sole responsibility of event organizers; however, STARability can provide donation forms for your use upon request.



## Third-Party Fundraising Application

### Section 1: Organization Information

Name of Organization or Event Host: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Phone (cell and work): \_\_\_\_\_

### Section 2: Event Information

Name of Event: \_\_\_\_\_

Event Type:  Private Party  Community Event  Other

If other, please describe: \_\_\_\_\_

Description/Event Summary: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Time of Event: \_\_\_\_\_

Location of Event: \_\_\_\_\_

Expected Number of Participants: \_\_\_\_\_

Fundraising Goal (after expenses): \_\_\_\_\_

Explain how you will promote the event: \_\_\_\_\_

Describe your target audience: \_\_\_\_\_

If you are selling goods and/or services, please indicate what will be sold and what portion (if any) of the proceeds will benefit STARability:

\_\_\_\_\_

I have raised funds for STARability before:  Yes  No

If yes, please explain your past fundraising for STARability:

\_\_\_\_\_

### Section 3: Financial Information

How funds will be raised:

Auction  Ticket Sales  Raffle  Donation Sales (merchandise, liquor, etc.)

Other (please explain): \_\_\_\_\_



I will be approaching sponsors:  Yes  No

If yes, please list businesses/organizations/vendors being approached:

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The proceeds from your event/activity will be donated ONLY to STARability:  Yes  No

If no, please list who else will be benefiting and what percentage STARability will receive:

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I will require tax receipts:  Yes  No

#### **Section 4: STARability Foundation Participation**

Describe the assistance you would like to see the STARability Foundation provide:

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I request a STARability representative at the event:  Yes  No

I would like materials and information from STARability at the event:  Yes  No

Brochures  Event Information  Volunteer Information  Other

There will be a table available for STARability information:  Yes  No

I will require the STARability logo and name for promotional use:  Yes  No

If yes, please indicate what type of promotional materials you will be producing:

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## Third-Party Fundraising Agreement

Please review and sign this application. This application is due 60 days prior to the proposed event. Completion of this application does not guarantee approval. Upon approval, you will receive a counter-signed copy of the application for your records.

By signing this application, I/we acknowledge receipt of the STARability Foundation's Policies and Procedures for Third-Party Fundraisers and agree to comply with all provisions in organizing and holding our third-party event. I also agree with the collection of any and all information the STARability Foundation deems necessary to evaluate the event. I further attest that all of the information provided on this form is correct and accurately describes the proposed event.

I understand that this is a proposal, and that I may not execute the event without prior written approval by the STARability Foundation. I understand that I am being granted permission to use the STARability Foundation logo and will not distort the graphics or display the logo in an unapproved manner.

I also agree to indemnify and hold harmless the STARability Foundation and its directors, employees, volunteers and legal representatives for any expenses, losses, claims or damages resulting from the third-party event or the noncompliance with any term or provision of the STARability Foundation.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
STARability Representative Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

Please return this application by mail or email to:  
STARability Foundation  
720 Goodlette-Frank Rd. N., Suite 400  
Naples, FL 34102  
Office: 239.594.9007  
Email: [events@starability.org](mailto:events@starability.org)