

**Fundraising Events benefiting the  
Lupus Foundation of America, Philadelphia Tri-State Chapter, Inc.**

**Introduction**

Thank you for your interest in conducting an event to benefit the Lupus Foundation of America, Philadelphia Tri-State Chapter (hereafter referred to as the “LFA”). The LFA relies on donations to fund vital research to find the causes and cure for lupus, to educate people with lupus, as well as their families and health care professionals about developments in diagnosis and treatment, and to provide support to individuals affected by lupus.

These Third Party Event Terms, Rules and Regulations are intended for organizations and individuals (referred to as “Third Party Event Sponsors”) voluntarily offering to donate the proceeds from an event or promotion to the LFA. Third Party Events are organized and carried out solely by the Third Party Event Sponsor (such an event is referred to as a “Third Party Event”). These Terms, Rules and Regulations are necessary to protect the rights of the LFA, as well as protect the Third Party Event Sponsor(s), clearly define the roles and responsibilities of the Third Party Event Sponsor and provide general guidance to the Third Party Event Sponsor(s). We thank you for your support and are happy to answer any questions you may have regarding this process.

Please note that if your event is a commercial co-venture, meaning an event or promotion that will benefit a for-profit company or organization with only a percentage of the proceeds being donated to the LFA, please contact the office at 215.517.5070 for the proper application and terms. This application, Terms, Rules and Regulations do not apply to such co-ventures or promotions.

Please note that Third Party Events are operated outside the governance and supervision of the LFA and, because of this, LFA is not responsible in any way for any and all activities and incidents associated with these events.

**Terms, Rules and Regulations**

- All Third Party Event Sponsor(s) must complete and submit the attached application a minimum of 30 days prior to the day of the event. You will receive written response from the LFA within 5-7 business days of the submission of your application.
- The LFA reserves the right to decline association with any organization or event when it believes that such association may have a negative effect on the credibility or reputation of the LFA. Our name must not be associated with any efforts deemed by the LFA to be obscene, pornographic, violent, intolerant, or tasteless.
- Additional documentation may be required for certain events (e.g. waivers for sporting events).
- The Third Party Event Sponsor assumes all risks for the expenses and liabilities, including appropriate insurance coverage, associated with the Third Party Event.
- By submitting a Third Party Event Application, the Third Party Event Sponsor(s) agrees to indemnify and hold harmless the LFA from any and all claims arising out of or related to the Third Party Event.

### LFA Support

- Unless otherwise agreed to in writing by the Board of Directors of the LFA, administrative support will not be provided by LFA for any Third Party Event. The LFA will, however, be happy to provide guidance or answer any questions the Third Party Event Sponsor may have about these Terms, Rules and Regulations or the LFA. Questions should be directed to [mmaloney@lupustristate.org](mailto:mmaloney@lupustristate.org) or 215.517.5070.

### Use of LFA's Name and Logo

- The LFA logo and name may not be used for any Third Party Event **unless agreed to in advance, in writing**, by the LFA. **Completion of the Third Party Event application does not constitute permission from the LFA to use LFA's name, logo or trademarks.**
- Upon approval of the Third Party Event application, event advertising, promotion, and associated materials such as signs, flyers, emails, invitations, Facebook pages, Twitter posts, etc. (referred to as "Third Party Event Promotional Materials") may in no way imply *sponsorship* of the Third Party Event by the LFA.
- In other words, you may **NOT** say: Sponsored by the Lupus Foundation of America.
- You may say:
  - XYZ Event benefiting the Lupus Foundation of America, Philadelphia Tri-State Chapter
  - All proceeds benefit the Lupus Foundation of America, Philadelphia Tri-State Chapter
- If approved, you will be sent an electronic version of the LFA logo to use for this event only. A new application must be filled out each time a Third Party Event is organized.
- Using the LFA Logo or any part of the logo without advance written permission is PROHIBITED. For example:
  - Third Party Event Sponsor MAY NOT replace the "p" in lupus with a question mark as seen in the LFA logo or use the LFA tagline Help Us Solve the Cruel Mystery™.
  - You may say:
    - Proud supporter of the Lupus Foundation of America, Philadelphia Tri-State Chapter
    - (XYZ Group) is helping to solve the cruel mystery.

### Revenue Generation

- The LFA requests that 100% of the Proceeds are donated, unless multiple charities are listed as additional beneficiaries. Proceeds are defined as: Total Revenue minus Total Expenses = Total Proceeds.
- Materials should clearly state: "All proceeds from the [Name of Third Party Event] to benefit the Lupus Foundation of America, Philadelphia Tri-State Chapter." If applicable, clearly state the percentage of proceeds to the LFA and any other charities. For example: "Proceeds to benefit the Lupus Foundation of America, Philadelphia Tri-State Chapter and the Arthritis Foundation."
- As a responsible steward of public funds, the LFA works to keep our expenses at or below 25% of our gross revenue as we advance the medicine and science of lupus. Likewise, we expect any Third Party Event Sponsor(s) that organizes and conducts an event to benefit the LFA to ensure that the expenses incurred in connection with the event do not exceed 25% of the gross revenue generated by the event. Exceptions may sometimes be made on a case-by-case basis.
- Collection of any fees, entries, and all contributions must be made directly to the Third Party Event Sponsor and **NOT** to the LFA.
- Payment of proceeds from the Third Party Event must be made to LFA within fifteen (15) business days following the event. Third Party Event Sponsors should contact their tax advisor to determine what portion, if any, may be tax deductible to them.

### Records

- The LFA encourages you to collect and submit information to the LFA for all donors/participants who contributed to the event.
- Accompanying the donation should be a complete accounting of all the funds collected and expenses related to the event. See attached sample budget form.

### IRS Regulations

Per IRS regulations, there must be no suggestion that event payments or donations made qualify as charitable (tax deductible) contributions.

**Application for Third Party Events benefiting the  
Lupus Foundation of America, Philadelphia Tri-State Chapter, Inc.**

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

Name of Third Party Event Sponsor: \_\_\_\_\_

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

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

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

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

Date of Third Party Event (mm/dd/yy): \_\_\_\_\_ Time of Event: \_\_\_\_\_

Location of Third Party Event: \_\_\_\_\_

Street: \_\_\_\_\_

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

Please describe the proposed special event or promotion: \_\_\_\_\_

\_\_\_\_\_

**SPECIAL REQUESTS**

- YES, please post my event online at [www.lupustristate.org](http://www.lupustristate.org)
- Please send me a solicitation letter for event donations
- Please mail me educational materials (indicate anticipated number of guests) \_\_\_\_\_
- Please mail me wristbands (indicate number requested per size ) Adult \_\_\_\_\_ Youth \_\_\_\_\_  
NOTE: Minimum retail price is \$1. You are responsible to payback \$1 per wristband sold or kept, minus the first 25, and return wristbands that are not paid for or sold. First 25 wristbands are FREE as a thank you!
- Please arrange for a representative from the Chapter to speak to the group (dependent on date and location)
- Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Why did you choose the Lupus Foundation of America, Philadelphia Tri-State Chapter as the beneficiary of your third party fundraiser? May we use your answer as a testimonial to encourage others to join our cause?  Yes  No

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**(OVER)**

\_\_\_\_\_

Here is a Sample Budget Table to help with your planning:

| <b>EVENT BUDGET</b>   | <b>PROJECTED AMOUNT</b> |
|---|-------------------------|
| Total Revenue   | \$                      |
| Total Cost (fill below)   | \$                      |
| Venue   | \$                      |
| Printing  | \$                      |
| Prizes  | \$                      |
| Food/Beverage   | \$                      |
| Advertising   | \$                      |
| Other (specify)   | \$                      |
| <b>Projected Proceeds:<br/>Total Revenue – (minus) Total Cost =</b> | \$                      |

- I understand and agree that 100% of the proceeds are being donated to the LFA, Philadelphia Tri-State Chapter.
- I understand and agree that a portion of the proceeds are being donated to the LFA, Philadelphia Tri-State Chapter with total proceeds being split amongst multiple charities as described:
  - o \_\_\_\_\_% to LFA
  - o Please list names and percentage (%) of the proceeds donated to the other participating organization(s)

\_\_\_\_\_

\_\_\_\_\_

Projected Donation: \_\_\_\_\_ Minimum Donation: \_\_\_\_\_

I, \_\_\_\_\_ understand that the Lupus Foundation of America, Philadelphia Tri-State Chapter (LFA) reserves the right to approve or deny this application to host a Third Party Event. I acknowledge that I have read and understand the Terms, Rules and Regulations and agree to abide by all terms. I understand and agree that the LFA's name and logo are registered trademarks. Pending approval by a representative of the LFA, I understand and agree to all terms regarding the use of the LFA's name and/or logo and will share draft promotional materials prior to publicizing and/or holding the event. By publicly naming the LFA as the beneficiary of my event, I agree to donate the full amount of the proceeds (unless donations are being split amongst other not-for-profit organizations) raised within 15 business days of the event date.

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Return Form to:**  
 Lupus Foundation of America, Philadelphia Tri-State Chapter  
 101 Greenwood Avenue, Suite 200, Jenkintown, PA 19046  
 Fax: 215-517-8483

**OFFICE USE ONLY**

Date Application Received: \_\_\_\_\_ Date Application Approved/Denied \_\_\_\_\_ Date Letter Mailed: \_\_\_\_\_

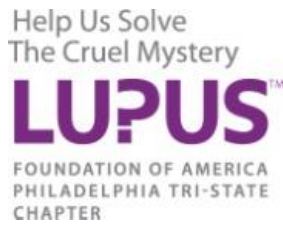
Notes: \_\_\_\_\_

## Post Event Budget Form

\*This form or a similar form is asked to be returned with the donation 15 business days post event.

| EVENT BUDGET                       | PROJECTED AMOUNT | ACTUAL AMOUNT |
|------------------------------------|------------------|---------------|
| Total Revenue                      | \$               | \$            |
| Total Cost (fill below)            | \$               | \$            |
| Venue                              | \$               | \$            |
| Printing                           | \$               | \$            |
| Prizes                             | \$               | \$            |
| Food/Beverage                      | \$               | \$            |
| Advertising                        | \$               | \$            |
| Other (specify)                    | \$               | \$            |
| <b>Total Revenue- Total Cost =</b> | \$               | \$            |

Projected Donation: \_\_\_\_\_ Minimum Donation: \_\_\_\_\_



**Return Form to:**  
 Lupus Foundation of America, Philadelphia Tri-State Chapter  
 101 Greenwood Avenue, Suite 200, Jenkintown, PA 19046  
 Fax: 215-517-8483

Name: \_\_\_\_\_

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

# of People attended: \_\_\_\_\_ Would you host this event again? \_\_\_\_\_

Any comments to help us improve our process? \_\_\_\_\_

\_\_\_\_\_