

**THE ALS ASSOCIATION
WISCONSIN CHAPTER
THIRD PARTY EVENT MANUAL**



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Dear Friend:

Thank you very much for your interest in holding a fundraising event for The ALS Association, Wisconsin Chapter. The ALS Association is the only not-for-profit voluntary health organization dedicated solely to the fight against Amyotrophic Lateral Sclerosis. Since 1984, the Wisconsin Chapter has grown from a single support group to a vital organization providing unique and incomparable services and programs available for those with ALS and their families. It is through the generosity of people like you that the Wisconsin Chapter is the most successful and active chapter in the country.

The Development Department has put together a package of information for all first time fundraisers for the ALS Association. This package is designed to help you successfully hold a fundraising event from the conceptualization stage through event day. The package contains information about ALS and The ALS Association, sample solicitation letters, fundraising tips, a special event agreement and guidelines for the use of The ALS Association's logo and much more. Please remember that the packet is intended to be a guide to help you through the planning of your event. However, if you need to speak with someone from the Development Department, please do not hesitate to call the office.

Thank you again for your dedication to The ALS Association. I hope you find this packet helpful and wish you success in your endeavor. The help you give today changes everything in the lives of those with ALS tomorrow.

Sincerely,

MELANIE M. ROACH-BEKOS
Executive Director
melanie@alsawi.org
(414) 763-2220

FUNDRAISING RECIPES FOR SUCCESS

Fundraising is an art. It has techniques and practices that are like recipes and anyone can learn them. The first rule of fundraising is to ask. You raise money when you ask for it, whether it be face to face, through direct mail appeals or special events. Raising funds does not take place in a vacuum. It is done by people, for people. It requires leadership, creativity, planning and lots of hard work. It requires people like you!

Each person planning a special event takes a different approach and sets his or her goals differently. When planning a special event, use what you know and like. If you are a golfer, maybe a golf outing is right for you. If you play pool, try to put together a pool tournament. If you are a runner, plan a road race or a walk. The important thing to remember is that the event should be something that you feel comfortable planning and participating in. If you are excited about the event, it will be easier for you to get your friends and others involved.

The second rule of fundraising is to ask for help. It is very difficult to put together a successful event without the help of friends and family (a committee). Ask your friends and family to join your committee and help plan the event. The size of the committee can vary, but when choosing your committee, you should look for people who are organized, can take direction, but also work autonomously, have community contacts, are able to work in a team structure and have the time and energy to devote to the event. Make sure to give each committee member specific tasks for which they are responsible and a mechanism to report on the progress of these tasks. This mechanism can be monthly/weekly meetings, emails or phone calls, but you need to keep in contact with your committee members on a regular basis.

Once you have decided on your event and have formed your committee, you are ready to get started planning. Set your goals for the event and start brainstorming new creative different ideas for your fundraising efforts. Remember, you are only limited by your creativity!

EVENT PLANNING CHECKLIST

Below are some areas that will need to be addressed when planning and executing your ALS fundraiser. These are not the only areas that need to be addressed, but they are a good start.

1. Put together a committee and decide type of event you would like to hold.
2. Set event planning timeline and goals of event.
3. Divide committee into subcommittees, including sponsorship, entertainment, publicity, logistics, volunteers, auctions, decorations and food.
4. Set event date and secure event location.
5. Decide cost of event and other ways that the event can raise money, *i.e.*, sponsorship, auctions, raffles, etc.
6. Determine how committee will handle expenses and collection of money:
 - ❖ Will committee set up account for funds raised or send funds directly to the chapter?
 - ❖ Will money raised be restricted to a specific fund or purpose or unrestricted allowing the chapter to use the funds in the way that is most needed?
7. Determine a way to track attendees at event.
8. Solicit sponsors for the event.
9. Solicit donated items for raffles, auctions as well as donated refreshments.
10. Design invitation, flyer or posters.
11. Determine who should be invited to the event and send out invitations.
12. Start soliciting volunteers for the day of the event.
13. Apply for permits or other necessary approvals (if necessary).
14. Secure entertainment, if necessary.
15. Create and send out press release.

WHAT WE CAN DO TO HELP YOU

The ALS Association Wisconsin Chapter is here to help you. We can provide several things to help make your special event a success:

- ❖ Literature about ALS and The ALS Association
- ❖ ALS letterhead and envelopes
- ❖ ALS banner
- ❖ Representative/speaker from The ALS Association when available (please understand that due to the volume of third-party events, representation requests often exceed the number of staff available to attend events. Therefore, we cannot guarantee that a representative will be able to attend your event)
- ❖ Help with mailings
- ❖ Support and guidance
- ❖ Event listed on calendar of events and website
- ❖ Use of the ALS logo on printed materials (pending chapter approval)
- ❖ Sample solicitation letters and sponsorship packages
- ❖ Thank you/receipt letters for donors

WHAT WE CANNOT DO TO HELP YOU

- ❖ Provide direct funding or reimbursement for expenses
- ❖ Solicit sponsorship revenue for your fundraising activities
- ❖ Provide celebrities or professional athletes for your event

EVENT IDEAS

Need help deciding on a special event? Here are just a few ideas:

- Basket Bingo
- Bat-a-thon
- Bike Ride
- Celebrity Waiter/Bartender Night
- Dance-a-thon
- Golf Outing
- Pool Tournament
- Run
- Tennis Tournament
- Wine tasting
- Basketball Marathon
- Beef and Beer
- Car Wash
- Concert
- Dress Down Day
- Miniature Golf Event
- Raffle
- Silent/Live Auction
- Walk

ALLOCATION OF FUNDS

The ALS Association Wisconsin Chapter allocates donations to three main areas – care services, research and operations.

The Chapter funds many vital programs and services for people living with ALS in Wisconsin and their families. The Chapter offers multidisciplinary ALS clinics at Froedtert Hospital/Medical College of Wisconsin, the Milwaukee VA Medical Center, at University Hospital & Clinics in Madison and at the Gundersen Clinic in LaCrosse. The Chapter provides support groups for people with ALS, their families and caregivers, an equipment loan program, a communication device program and grant assistance through the Brian Trinastic Memorial Grant Program.

Thanks to The ALS Association's support, there have been significant scientific discoveries about ALS in the last five years. The Wisconsin Chapter is dedicated to finding a cause and cure for ALS. This is truly an exciting time for ALS research.

Funds raised can be restricted for any of these general areas, for a specific program or left unrestricted. By not restricting the funds, you allow the Chapter to use the funds you raise in the area of most need at the time.

SPECIAL EVENTS AGREEMENT OPTIONS

When organizing or chairing a special event for The ALS Association, there are two options for tracking funds raised through the event.

The first option requires that the chairperson or committee member tracks participation and/or donations on an excel spreadsheet to be given to The ALS Association on a regular basis. All checks would be made payable to The ALS Association but sent to the event chairperson and then forwarded along with an updated spreadsheet to The ALS Association’s office. Thank you/receipt letters would be sent from The ALS Association office.

The second option is for the committee to open a bank account specifically for the event. Checks would be made to the event and expenses for the event would be paid through the account. Once all funds have been received and expenses have been paid, the account would be closed and a check would be sent to The ALS Association. This option allows you to track and control your finances. Please consult with your bank of choice for the requirements necessary to open an account.

Option One

I, _____, am proud to pledge the proceeds from my ALS fundraiser solely to the Wisconsin Chapter of The ALS Association. I understand that The ALS Association, Wisconsin Chapter, is a not-for-profit 501.C.3 organization and will have checks made payable to The ALS Association. I agree to supply the required donor information in an excel spreadsheet format so that The ALS Association can expeditiously account for funds raised and can accurately supply receipts for tax purposes.

Signature

Date

Option Two

I, _____, am proud to pledge the proceeds from my ALS fundraiser solely to the Wisconsin Chapter of The ALS Association. I understand that The ALS Association, Wisconsin Chapter, is a not-for-profit 501.C.3 organization. I and/or the committee will establish a personal account to which checks will be made. Upon completion of this event, I or the committee will prepare a check made payable to The ALS Association for the proceeds.

Signature

Date

OTHER SPECIAL EVENTS AGREEMENT OPTIONS

Some event organizers choose to divide the proceeds of their event between a particular patient or a charity and The ALS Association. In this case, when The ALS Association is *not* receiving 100% of the net proceeds, we can help in the following ways:

- ❖ Provide literature about ALS and The ALS Association
- ❖ Door prizes (limited supply)
- ❖ Auction/raffle items (when available)
- ❖ Support and guidance
- ❖ Event listed on calendar of events and website
- ❖ Use of the ALS logo on printed materials (pending chapter approval)
- ❖ All printed and promotional materials must state that “a portion of the proceeds will benefit The ALS Association”
- ❖ Sample solicitation letters and sponsorship packages

Because of our 501.C.3 status, The ALS Association is not able to provide receipts for tax purposes for these types of events.

I, _____, am proud to pledge ____% of the proceeds from my ALS fundraiser to the Wisconsin Chapter of The ALS Association. I understand that The ALS Association, Wisconsin Chapter, is a not-for-profit 501.C.3 organization. I and/or the committee will establish a personal account to which checks will be made. Upon completion of the event, I or the committee will prepare a check made payable to The ALS Association for the appropriate percentage of proceeds raised.

Signature

Date

TERMS OF USE

The ALS Association Logo

The ALS Association's logo is unique to the organization and its use is protected by federal law through trademark legislation. Its use is restricted to The ALS Association unless written permission is received from its National Office. The registration mark ® (or trademark ™ as applicable) should appear in all instances.

Since its introduction, the logo has been incorporated into signage, stationery, publications and advertising. Thus, the identifying symbol has attained a high degree of recognizability among our most important audiences. The ALS Association's logo should appear either on the front or back cover of all brochures and publications distributed by the event. If the logo is not used on the front cover, it may appear by itself, without the spelled-out name of the organization. In this case, it is recommended that it be printed on the back cover of a brochure, with address and phone number.

Identity

Symbols, logos and other designs are intended to instantly convey a distinct impression of an organization's identity and character. The symbols and overall graphic designs, unique to an organization, give its products, services and publications a unifying "family" identity which is critical to its ability to compete for public recognition and support. These symbols, logotypes and phrases are registered/copyrighted to protect them from use by others.

In addition to proper use of the logo and the logo type as described, you must also be correct and consistent when using the name of our organization in text, whether it is a letter, a brochure, newsletter, etc.

In text, the first reference should always be The ALS Association. Note that the "t" in the "The" is a capital "T" regardless of where in the sentence the name appears. The first reference may also be The Amyotrophic Lateral Sclerosis Association, also with a capital "T." After the first reference, use The Association, always with a capital "T." Remember ALS is the disease. The ALS Association is the organization. It is also important to remember that we are The ALS Association, not *Foundation* or *Society*. We use the phrase Lou Gehrig's Disease as a comprehension clue.

Approval of Material

As stated above, the use of logos and titles is important. Your collateral material is a reflection on the Wisconsin Chapter and must meet our standards. Therefore, before any material is printed and distributed for your event, you must receive the written consent of a Chapter representative. Simply fax or email your material for review and a written authorization will be promptly returned. Revisions may be necessary. The Chapter must approve the final draft. We thank you in advance for your understanding and cooperation.

WHAT SUPPORT WILL BUY AN ALS PATIENT . . .

<u>When you Raise</u>	<u>You Help Provide PALS*</u>
\$25.00	Personal pager
\$40.00	Two hours of in-home care (dressing, bathing, etc.)
\$60.00	Door chime to call for help
\$150.00	One resource (support) group session
\$225.00	Van transportation to/from Clinic or a social event
\$350.00	One visit at our ALSA-certified clinic at Froedtert Medical Center/Medical College of Wisconsin
\$550.00	Lightweight wheelchair
\$1,330.00	A "Link" communication device
\$4,000.00	Lightwriter(R) communication device

*Person with ALS

APPENDIX A

SAMPLE SOLICITATION LETTERS, SPONSORSHIP PROPOSALS, PLEDGE SHEETS, PRESS RELEASES



APPENDIX B

AUTHORIZATION TO OPERATE AN EVENT FOR THE BENEFIT OF THE ALS ASSOCIATION, WISCONSIN CHAPTER FORM



**Authorization to Operate an Event for the Benefit of
The ALS Association, Wisconsin Chapter**

Thank you for offering your support of the fight against ALS. In order to protect the Chapter's 501.C.3 status, we request you fill out the following agreement:

I, the undersigned, agree to represent a group to be known as

**

which will organize and sponsor an event to be known as

I understand that the primary purpose of this event shall be to raise funds for The ALS Association, Wisconsin Chapter (ALSA Wisconsin Chapter)* and that all funds raised shall be submitted to the ALSA Wisconsin Chapter in support for its program and research. Expenses for the event will not be paid for by either ALSA Wisconsin Chapter or from funds received from the event. Payment of any expenses must be paid for directly by the sponsoring group.

I understand the (The Group)** shall conform to all regulations and policies and practices of the ALSA Wisconsin Chapter pertaining to fundraising.

This agreement shall be in force for the duration of the event. The ALSA Wisconsin Chapter Board reserves the right to cancel support of the event for any reason regarded by the Board to be sufficient.

In the event of termination of this agreement, the (event name) shall forward all funds raised in the name of (The Group) to the ALSA Wisconsin Chapter.

Further, if (The Group) continues to raise money for ALS, the ALSA Wisconsin Chapter shall take affirmative steps to inform the public and all person with whom (The Group) has contact, including all persons who have contributed money to (The Group) that (The Group) is no longer affiliated with the ALSA Wisconsin Chapter.

Responsibilities of The Group

(The Group) agrees:

To submit a description of the event.

To maintain a high standard of good taste and ethics in relation to all fundraising events.

To be responsible for all expenses incurred in conjunction with all fundraising activities and to absolve the ALSA Wisconsin Chapter of any such responsibility.

To submit all promotional material using the ALSA name and/or logo to the ALSA Wisconsin Chapter for approval prior to printing or use.

To submit all net proceeds from the event within sixty (60) to the ALSA Wisconsin Chapter for deposit in the Chapter bank account.

To submit a completed post event report within sixty (60) days following the event.

Responsibilities of the ALSA Wisconsin Chapter

ALSA Wisconsin Chapter agrees:

To supply reasonable amounts of materials about ALS and the ALSA Wisconsin Chapter free of charge.

To confer all proper use of the ALSA Wisconsin Chapter name and logo to The Group.

To maintain regular communications with The Group leader.

To use all funds received from The Group to support the work of the ALSA Wisconsin Chapter. The Group may elect to restrict the use of funds to a specific chapter program, research or part of the service area, but not to a specific patient.

*ALS Association Wisconsin Chapter shall be referred to as ALSA Wisconsin Chapter

**The name of the group putting on the benefactor event shall be referred to as "The Group"

APPENDIX C

WISCONSIN CHAPTER BENEFACTOR EVENT FORM



ALSA WISCONSIN BENEFACTOR EVENT INFORMATION SHEET

EVENT NAME:	
GROUP NAME:	
CONTACT INFORMATION:	
First Name:	Last Name:
Company Name:	Address:
City:	State: Zip:
Business Phone:	Home Phone:
Email Address:	Fax:
DATE OF EVENT:	
ESTIMATED DONATION:	ESTIMATED ATTENDANCE:
DESCRIPTION OF EVENT:	
SUPPORT NEEDED:	
Banner _____	
Logo _____	
Other _____	
POST EVENT REPORT: Please include:	
_____ Copy of all Printed Materials	_____ Pictures of Event
_____ Attach Financial Report	_____ List of Sponsors
_____ List of Event PR	_____ Copies of Advertising
_____ Actual Attendance	_____ Other Pertinent Information