



Third Party Fundraising Policy & Agreement

The mission of Lutheran Metropolitan Ministry (LMM) is to promote shalom (peace, well-being) and justice (right relationships) through a Christian ministry of service and advocacy. LMM seeks that people who are oppressed, forgotten, and hurting be empowered, valued and healed by our unwavering commitment to addressing chronic needs, enabling people to self-sufficiency, and advocating for system change. We seek to change the social, political and religious conversation about justice from one of limitations to one of possibilities.

LMM is very grateful to the many people, companies, faith-based partners and organizations that support our mission. Third Party Fundraisers are a wonderful way to engage with our programs and services. At LMM we hold ourselves accountable to the Association of Fundraising Professionals (AFP) Donor Bill of Rights and the Code of Ethical Principles and Standards of Professional Practice. In an effort to ensure that LMM affiliated fundraising activity is also held to these standards and regulation established by the IRS and the Ohio Attorney General, LMM has developed specific criteria for hosting Third Party Fundraisers in support of our work.

All Third Party Fundraising efforts that meet our criteria and benefit the organization will be considered. Each event will be reviewed on a case-by-case basis. Please review this Third Party Fundraising Policy to better understand how to support the mission of our organization. After reviewing these guidelines, please sign the agreement page within, and complete and submit for approval the attached Third-Party Fundraising Application. Return both files to LMM's Director of Development for consideration.

Definitions

1. **Third Party Fundraising** – A fundraising event or activity hosted by a group or individual, where LMM has no fiduciary responsibilities and little or no staff involvement.
2. **Event Organizer** – Person, group, or business hosting a Fundraising event to benefit LMM.

Organizer Requirements/Responsibilities

1. Event Organizer will not seek donations or affiliate itself with any publically recognized political party for the purpose of fundraising.
2. Event Organizer will not retain service of a subcontractor without the express written permission of LMM. Further, any subcontractor retained for fundraising will adhere to the terms of this policy.

The organizer is responsible for planning and obtaining support for the fundraiser from inception to the day the check or donation is issued to LMM. It is his/her/their responsibility to develop logistics and secure the venue, attendees, promotions, prizes, entertainment and staff that are necessary for a successful event, including its fundraising aspects. Your efforts must draw the majority of participants. We look forward to answering your questions and providing support where we can. You must demonstrate a willingness and ability to fully coordinate a successful effort in order for your event to be approved.

Pre-Application Considerations: Before filling out the Third Party Fundraiser Application, the organizer(s) should do the following with respect to the proposed fundraiser:

- Contact LMM's Director of Development to discuss the fundraiser concept
- Determine what the event will be and an appropriate name
- Select a date and location for the event
- Set a realistic goal in terms of the dollar amount you will raise
- Create an event budget, with an estimate of revenues and expenditures
- Determine how funds will be raised (e.g. ticket sales, a silent auction, donations, selling t-shirts, etc.)

- Determine who your audience is and how you will tell them about your event

Event Application and Approval Process

- Please allow at least 6 weeks prior to your fundraiser for submitting an application for approval
- Signed approval by LMM’s Vice President of Development & Communications must be obtained before you advertise or hold your event.
- Annual events should be registered with LMM each year.
- LMM reserves the right to refuse funds raised at unapproved events and activities.

Marketing and Promotion

- Third-Party events may not be represented as events presented or sponsored by LMM.
- Promotions for the event should reflect LMM as the beneficiary, and not as conducting the event (i.e. “TBD Event to benefit Lutheran Metropolitan Ministry”).
- All promotional materials related to an event benefiting LMM and use of the LMM logo must be reviewed and approved by the LMM Director of Communications prior to distribution (e.g. flyers, press releases, tickets, brochures, posters, T-Shirts, etc.).
- The appropriate logo for your use will be provided by our Director of Communications. Please do not use LMM logo images secured online.
- All references to LMM in publicity and promotional materials for the event should refer to “Lutheran Metropolitan Ministry” or “LMM”.
- The organizer will be provided with a copy of the LMM Brand & Communications Standard Booklet for reference on all messaging, communications and promotional materials.

Event Expenses

- If you must buy goods or services for the event and expenses will be incurred, please consider the following:
 - Expenses incurred for conducting the event are the responsibility of the Event Organizer.
 - LMM will not be liable for any costs or expenses.
- LMM will not reimburse organizer(s) for the purchase of goods for a third-party event.
- No goods may be charged to LMM for any reason.

Event Income

- The event organizers are responsible for maintaining the accounting for the event.
- **Third Party Fundraisers are not authorized to apply for grant funds on behalf of LMM.** Only a member of the LMM Development Staff or a contracted consultant can apply for grant funding from a corporate sponsor, foundation or donor advised fund. **No exceptions.**
- All donation checks must be payable directly to “Lutheran Metropolitan Ministry” or “LMM”.
- All cash donations should be kept in a secure location by the event organizer.
- All credit card transactions should be processed by the event organizer.
- Only checks payable to LMM and cash donations clearly labeled with the donor’s information will be provided with a tax deductible acknowledgment letter in accordance with IRS and state tax regulations.
- Donations made out to an organizer or other source, and in-kind donations may be sent a general acknowledgment letter with no value attached.
- If you are deducting expenses before sending net proceeds to LMM, you should not state or imply to your donors that all funds given are tax deductible. You should state the minimum portion or percentage of the amount charged that will benefit LMM. (e.g. “For every \$ _____ we raise at TBD Event, \$ ___ will go to LMM”).

- Only use the terms “donation” and “tax-deductible” if 100% of funds given will be gifted to LMM, with no goods or services in exchange.
- The Third Party should clearly disclose how LMM will benefit from the sale of products or services when you state or imply that LMM will benefit from a transaction. Such promotions should disclose, at the point of solicitation:
 - The actual or anticipated portion of the purchase price that will benefit LMM
 - The duration of the campaign (e.g., the month of April).
 - Any maximum or guaranteed minimum contribution amount (e.g., up to a max of \$1,000).
- All Third Parties agree to inform LMM of any effort to recruit major financial sponsorship to ensure there is no duplication of funding, donation or sponsorship efforts already underway. This information should be made available by submitting a list (Microsoft Word doc, Excel spreadsheet or email notice) at least 2 weeks prior to sending out any formal request for support.
- LMM defines a “major” event sponsorship as greater than \$1,000.
- LMM discourages fundraisers that involve telemarketing or door-to-door sales.
- It is not our desire to limit your plans, but to protect our own relationships with those who give directly to our organization on a regular basis.
- LMM discourages approaching professional sports teams, athletes or celebrities on our behalf.

Event Insurance and Liability

- The event organizers are responsible for obtaining any necessary permits and clearances required by local and state government, and complying with all applicable laws.
- The event organizers are responsible for obtaining appropriate insurance coverage as necessary.
- LMM will not be held liable for details associated directly or indirectly with the event, including, but not limited to: expenses, purchases, insurance or liability coverage.
- LMM reserves the right to choose not to affiliate with any event where fundraising methods do not reflect the organization’s mission, vision and values.
- This policy will indemnify and hold LMM harmless from any and all claims of any kind or nature whatsoever arising out of, or in any way related to, the Fundraiser.
- Nothing in this document shall be construed to authorize the organizer, or any of its representatives, to act as an agent of LMM

How can LMM help with your event?

We recognize the hard work that goes into your fundraising efforts and understand that you may require additional resources to make your event a success. As an organization we do our utmost to ensure efficiency and appreciate your investment in helping us raise funds to maximize our ability to provide programs and social services.

LMM is appreciative of the organizers who manage third-party events to our benefit, but we are limited in the amount of assistance we can provide a third-party event.

LMM can provide the following:

- Donation tracking sheet
- Advice and suggestions on event planning, as time allows.
- Approval of the use of LMM name, logo and images.
- Promotional materials for display. (event signs, tablecloths, brochures, etc. *when available*)
- Promotion of your event, when appropriate, to the LMM community through our media content platforms (website, social media and internal communications).
- Acknowledge and tax receipts for contributions made payable and submitted to LMM.

LMM is unable to provide the following:

- Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees, and collecting monies.
- LMM's tax-exemption number for making any purchases related to your event.
- Guaranteed participation of volunteers, Board Members, or staff at the event. Participation will be considered on a case by case basis
- Access to donor lists or contacts.
- Responsibility of any nature or kind associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance or liability coverage.

Closing Out Your Fundraiser: As your fundraiser comes to a close, we have a few guidelines that we ask you to follow, in order to ensure the internal standards of LMM's Development & Communications Department are maintained.

- Within 30 days following the event, organizers should submit funds, payable to LMM, and appropriate documentation from individuals and/or businesses regarding their financial donations.
- You can mail donations to the VP of Development & Communications office or deliver donations addressed to the VP of Development & Communications located at the Richard Sering Center, 4515 Superior Avenue, Cleveland, OH 44103.
- Complete the Donation Tracking Sheet, so that all donors and supporters can be acknowledged in writing by LMM.
- Do not deposit any checks made payable to LMM or attempt to open a bank account in the name of LMM. Please deliver all checks made payable to LMM to our office and we will deposit them.

Authorized Signatures: Please Note: Consideration of your Third Party Fundraiser application will not begin until a copy of this policy is signed by a representative of your company/organization and LMM.

I have read, understand and agree to abide by the guidelines of LMM's Third party Fundraiser Policy.

Signature of Authorized Organizer

Print Name

Title

Date