

National Multiple Sclerosis Society

"THIRD PARTY EVENT" APPLICATION

General Information

1. Name of group or individual: _____

2. Address: _____
Telephone: W) _____ H) _____ FAX _____
3. Individual making inquiry: _____
Position: _____
4. Reason for inquiry: _____

5. If a for-profit organization, kind of business: _____
Would the business be involved in the activity? _____ How? _____

Fund Raising Activity

1. Describe the activity (attach extra sheets if necessary): _____

2. Date event would be held? _____ Where? _____

3. Is there a written plan? _____ (please attach)
4. Has the event been done before? _____ If yes, by whom/results? _____

5. Who will direct and coordinate the event? _____

6. What will the NMSS chapter be expected to provide? (Please describe below)

A. Leadership:

B. Manpower:

C. Services:

7. Who will handle publicity? _____

Is there a plan? _____

8. How do you plan to sell tickets and/or market the event? What is the responsibility of NMSS?

9. Is corporate underwriting planned? _____ From whom? _____

Who will solicit and recruit corporate support? _____

10. Is liability insurance necessary? _____ Who will secure it? _____

Financial Information

1. Is there a budget for the event? _____ (If so, please attach a copy)

2. What is projected gross income? \$ _____

3. What are anticipated costs? \$ _____

4. What percentage of the proceeds will be remitted to NMSS? _____%

net or gross? _____

Date

Signature

THIRD PARTY EVENT GUIDELINES

The National Multiple Sclerosis Society (the Society) defines a "Third Party Event" as any fund raising activity by a non-affiliated group or individual, where the Society has little fiduciary responsibilities and little or no staff involvement.

These events may include two types:

- . Non-affiliated - This type connects MS with an existing event, activity or program, and a portion or all of the proceeds are donated to the chapter.**
- . Special Interest - This is the organization of an independent event specifically designed to raise funds for MS, with all net proceeds go to benefit the chapter.**

The Society is extremely grateful to the many outside persons who wish to organize events to support the research and programs we fund each year. However, only those "Third Party Events" which meet specific criteria, and legitimately and genuinely benefit the Society, will ordinarily be endorsed. Each event will be reviewed on a case-by-case basis.

The following are the Society approved guidelines for a "Third Party Event." Both the outside party and the Society must agree upon these guidelines. An event application should be submitted for review and approval before initiation of the event takes place.

PROMOTION

The event will be promoted and conducted in a manner to avoid statement or appearance of the Society endorsing any product, firm, organization, individual or service.

The Society reserves the right to decline association with any organization when it believes that such association may have a negative effect on the credibility of the Society.

All "Third Party Events" should establish a timetable and action plan a minimum of three months before the event. A Society person should be utilized to aid in the development of committee structure, marketing and deadlines.

The official logo of the Society should be appropriately used in conjunction with such an event, but may not be altered in any way. Any use of the Society logo must adhere to established standards published in the Brand and Marketing Guidelines and the Branding Guidelines for Third Party Events. The interim Branding Guidelines for Third-Party Events are available upon request. Please contact Sherri Giger, Marketing (Sherri.Giger@nmss.org) for a copy.

The Society must review and approve all promotional materials including, but not limited to, advertising, letters, brochures, flyers and press releases prior to production or distribution.

Promotional and/or advertisements cannot be purchased with Society funds. Any such advertisement should be the result of underwriting or sponsorship related to the event.

The Society reserves the right to participate in similar promotions and other "Third Party Events."

The Society reserves the right to decline endorsement of an event if other non-profit organizations are beneficiaries and/or involved in the event without mutual compliance.

The event location and its promotion should remain within the chapter's territory.

LIABILITY

The Society is not financially liable for the promotion and/or staging of a "Third Party Event."

Alcohol at such an event should be avoided unless it is believed to be important to the success of the event. Alcohol disbursement should be via a "cash bar" and availability should not be promoted. Restaurant or facility staff should serve attendees and/or participants. Proof of age will be required and signs posted to that effect. Alternative means of transportation should be available to attendees and/or participants.

"Third Party Event" organizers must have participants complete a waiver for release from liability when requested by the Society. Depending on the auxiliary and the extent of the exposure, the responsible parties must have liability/property insurance applicable to the activities of the event. The third party must also provide evidence of a general liability insurance policy with a minimum of \$1 million per occurrence from an insurance carrier with a XV+ best rating or better to the Society. Depending on the extent of Society involvement and the risk associated, the Society must be listed as an additional insured on the third party's insurance policy. The "third party event" organizers may be involved with various vendors during the event. The vendors must provide evidence of insurance and include the organizers as additional insured. If at any time there is some question as to what should be required, we ask that chapters contact risk management for clarification.

ACCESSIBILITY

All "Third Party Events" should be accessible to people with disabilities. The event should take place at a location that meets ADA regulations.

"Third Party Event" organizers should promote and make arrangements for any special accommodation needs by participants, volunteers, and/or staff.

REVENUE GENERATION

For Special Interest Events, 100% net (minus campaign expenses) income must be remitted to the Society.

For Non-affiliated events, a minimum of 50% gross income should be remitted to the Society. However, exceptions may be made depending on the magnitude of the event, or other factors determined to genuinely benefit the Society through its endorsement.

All promotional materials must clearly state the percentage of proceeds and/or the portion of the ticket price that will benefit the Society.

The Society must receive all net proceeds within 30 working days of the conclusion of the event and/or promotion.

RECORDS

The Society should receive a list of targeted sponsors for the event, before they are approached, to minimize overlap with other campaigns.

The Society should receive a complete accounting of all funds collected and expenses related to the event.

The Society reserves the right to inspect all event financial records.

The Society will receive a list of all tangible non-cash contributions to the events.

The Society will receive a list of all donors who contributed to the event.

"Third Party Event" organizers will collect names of participants, sponsors and volunteers, mailing appropriate materials as needed. Organizers may coordinate with the Society for assistance.

TAX ISSUES

According to Section 170 of the Internal Revenue Code, the general rule is, "There shall be allowed as a deduction any charitable contribution (as defined in subsection (c)) payment of which is made within the taxable year." Subsection (c) goes on to define the term "charitable contribution" as meaning a gift to or for the use of qualified organizations. To become qualified, most organizations must apply to and be

approved by the IRS. If a payment is made to an organization that is a qualified organization, the payment is a charitable contribution.

ORGANIZATIONAL ISSUES

The National Multiple Sclerosis Society has applied to and been approved by the IRS as a charitable (qualified) organization as defined by Internal Revenue Code Section 501 (c)(3) meaning that contributions to the Society qualify for the maximum charitable contribution deduction under the Internal Revenue Code. Chapters have been reported to the IRS as part of the Society and thus are also charitable organizations that qualify for the maximum charitable contribution deduction. If chapters establish branches or auxiliaries that are part of the chapter and controlled by the chapter, they would also qualify on the basis that they are part of an already existing qualified organization.

PRACTICAL ISSUES

A difficulty arises when an independent, outside organization wishes to raise money for the Society. If the payments are made to this independent organization and it is not a qualified organization, the payments will not be deductible for income tax purposes. If the payments are payable to the Society, then they qualify - to the extent allowed by law.

The last section of the manual includes a copy of the “Third Party Event” guidelines, signature page and application form to be used by chapters requiring signature once guidelines have been read and understood. In addition, an application is required for any “Third Party Event” to be completed by the chapters and sent directly to the insurance/risk manager for review.

Contact:

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