



Dear Blue Jackets Foundation Donor,

We appreciate your interest in hosting an event to benefit the Columbus Blue Jackets Foundation. Third-party fundraisers like yours are vitally important to sustaining our mission and we want to help assure your event is a success.

The Columbus Blue Jackets Foundation is accountable to the public and the IRS for fundraising activities containing our name, therefore the enclosed documents were created to educate you on the specific steps and criteria required when planning your event. Only third-party events that complete the enclosed documents and meet the criteria will be considered for approval. Each event is reviewed on a case-by case basis. Due to the demand of the hockey season, the Foundation does require requests are received 6-8 weeks ahead of the event for processing.

Please review the enclosed and mail completed documents to:

Kate Furman  
Columbus Blue Jackets Foundation  
200 W. Nationwide Blvd.  
Columbus, OH 43215  
Attn: Third-Party Event Request

Please feel free to contact Kate Furman directly at 614-246-4168 if you have additional questions. We sincerely appreciate your support of the Columbus Blue Jackets Foundation.

Sincerely,

Wendy Bradshaw  
Executive Director  
Columbus Blue Jackets Foundation  
[www.BlueJacketsFoundation.org](http://www.BlueJacketsFoundation.org)

Enclosures



## Steps for Organizing a Third-Party Fundraising Event

[Note: As used in these Guidelines, the terms “you” and “your” refer to the interested third party fundraising organization, which is also referred to herein as “Fundraiser”]

### The Fundraiser agrees to:

- Read and follow the attached Special Events and Promotion Guidelines.
- Submit the attached Fundraising Request Form
- Submit all promotional materials mentioning the Columbus Blue Jackets Foundation or using our logo for approval before distribution. This includes flyers, press releases, tickets, brochures, posters, etc. Allow 6 weeks for approval.
- Submit appropriate documentation from individuals and/or businesses regarding their financial or in-kind donations.
- Submit all raised funds, payable to Columbus Blue Jackets Foundation, within 60 days of the event.

### The Columbus Blue Jackets Foundation agrees to:

- Provide coordinating advice and counsel when called upon and as time permits.
- If possible, arrange and coordinate attendance at the event by a Columbus Blue Jackets Foundation staff member or volunteer. Note: Although this presence is desirable, it cannot be guaranteed.
- Properly acknowledge all contributions per IRS and state tax regulations.  
Columbus Blue Jackets Foundation Tax ID - 31-1688700.

### Important notes:

- Approval by the Columbus Blue Jackets Foundation must be obtained prior to advertising your event.
- The Columbus Blue Jackets Foundation logo, the Columbus Blue Jackets team name, logo and trademarks, and Blue Jackets’ players’ names and/or likenesses shall not be used without prior written request and prior written approval. Allow 6-8 weeks.
- The Columbus Blue Jackets Foundation shall be identified as the beneficiary of the event, not the sponsor. Example: The XYZ Golf Tournament to benefit the Columbus Blue Jackets Foundation.
- Annual events should be registered with the Columbus Blue Jackets Foundation each year.
- Opening a bank account in the name of the Columbus Blue Jackets Foundation, or in any name similar thereto, is strictly prohibited.
- All expenses incurred for conducting the event are the responsibility of the organization responsible for the event. Any invoices submitted to the Columbus Blue Jackets Foundation will be forwarded to the Fundraiser
- The Blue Jackets Foundation encourages Fundraiser to link Fundraiser’s event details to [www.BlueJacketsFoundation.org](http://www.BlueJacketsFoundation.org) web site for additional exposure.



## Special Events and Promotions Guidelines

Donations to the Columbus Blue Jackets Foundation are extremely important and your interest in supporting the mission in support of our four key focus areas of giving: fight against pediatric cancer, children's health and safety, education, and the development of youth and amateur hockey is greatly appreciated.

The Columbus Blue Jackets Foundation is accountable to the public and Internal Revenue Service for fundraising activities using the name of the Columbus Blue Jackets Foundation. To this end, the following guidelines have been developed to serve as standards for those who organize special events, benefits or promotions on behalf of The Columbus Blue Jackets Foundation.

The Columbus Blue Jackets Foundation defines a "Third-Party Event" as any fundraising activity by a non-affiliated group or individual, where the Foundation has no fiduciary responsibilities and little or no staff involvement.

### **Guidelines, Policies and Procedures:**

#### **Marketing and Promotion**

- Third-party events may not be represented as events sponsored by the Columbus Blue Jackets Foundation.
- Promotions for the event should reflect the Columbus Blue Jackets Foundation as a beneficiary, and not as conducting the event (i.e., "a portion of the proceeds from XYZ Golf Tournament will benefit the Columbus Blue Jackets Foundation").
- All promotional materials related to an event benefiting the Columbus Blue Jackets Foundation must be reviewed and approved by the Foundation's Executive Director prior to distribution. Therefore, any request for use of the Columbus Blue Jackets Foundation logo or trademark must be submitted 6 – 8 weeks in advance and in writing to the Columbus Blue Jackets Foundation. The use of the Columbus Blue Jackets logo is primarily reserved for events hosted by the Foundation itself.
- All references to the Columbus Blue Jackets Foundation in publicity and promotional materials for the event or promotion should refer to the "Columbus Blue Jackets Foundation."

#### **Event Expenses**

- If you must buy goods or services for the event and expenses will be incurred, please consider the following:
- The Columbus Blue Jackets Foundation will not be liable for any costs or expenses. Any expenses associated with producing the event are the sole responsibility of the hosting volunteers and the Fundraiser.
- The Columbus Blue Jackets Foundation will not reimburse Fundraiser for the purchase of goods for a third-party event. No goods may be charged to the Columbus Blue Jackets Foundation for any reason.
- The Columbus Blue Jackets name shall not be used to leverage in-kind contributions, sponsorship or volunteer support for the event.

#### **General**

- Fundraiser is not permitted to host a fundraising event that includes lotteries, gambling, fortune telling, raffles or drawings without formal discussion with the Foundation.
- A fundraising event that requires any type of license should first be discussed with Foundation prior to Fundraiser applying.
- Fundraiser events should not conflict with any existing event(s) benefiting the Columbus Blue Jackets Foundation.

#### **Event Income**

- The Fundraiser is responsible for opening and maintaining its own bank account for the event. Bank accounts may not be opened in the name of, or on behalf of the Columbus Blue Jackets Foundation, or any name similar thereto, for any reason.
- Any check payable to the Columbus Blue Jackets Foundation must be sent directly to:

Columbus Blue Jackets Foundation  
200 W. Nationwide Blvd.  
Columbus, OH 43215  
TAX ID 31-1688700

- Only checks payable to the Columbus Blue Jackets Foundation will be provided with a tax-deductible acknowledgement letter in accordance with IRS and state tax regulations. Checks payable to a Fundraiser or other source may be sent a general acknowledgment letter with no value attached.
- If you are deducting expenses before sending net proceeds to the Columbus Blue Jackets Foundation, you should not state or imply to your donors that any funds given to you are tax-deductible, and you should not use the word “donation” because it implies that they are tax-deductible.
- Fundraiser agrees to inform the Columbus Blue Jackets Foundation of any effort to recruit major financial underwriters to ensure there is no duplication of underwriting efforts already underway by the Blue Jackets team and/or Foundation.

### **Event Insurance and Liability**

- Fundraiser is responsible for obtaining any necessary permits and clearances required by the government and compliance with all applicable laws. Fundraiser must also obtain appropriate insurance coverage as necessary.
- Venue: All third-party events should ideally be accessible to people with disabilities. Ideally the event should take place at a venue that meets ADA regulations. Fundraiser is expected to promote and make arrangements for any special accommodations and needs by participants.
- Fundraiser should budget to use no more than 25% of gross revenue to cover expenses.

### **Tax Guidelines and Implications**

- As a responsible steward of public funds, the Columbus Blue Jackets Foundation holds to the standard set forth in the Better Business Bureau guidelines. Events held to benefit the Columbus Blue Jackets Foundation are required to keep expenses to a minimum.
- If Fundraiser represents to the public that a percentage of the event proceeds will benefit the Foundation, Fundraiser should be prepared to provide access to an accounting of revenues and expenses. If so requested, an accounting and fund distribution will be expected within 60 days after the conclusion of the special event or promotion.
- Fundraiser is responsible for complying with all IRS regulations regarding the event.
- Federal tax laws prohibit third-party fundraising organizations from using the Columbus Blue Jackets Foundation Sales Tax Exemption number or Federal Employer Identification number when purchasing any goods or services from suppliers or vendors.

*The Columbus Blue Jackets Foundation is limited in the amount of assistance it can provide a third-party event. Third-party management of the event therefore acknowledges and agrees that it will provide sufficient staffing to manage and operate the event, and that the Foundation staff may render limited assistance, if any, to the reasonable level of their resources.*

### **The Columbus Blue Jackets Foundation can provide the following:**

- Advice and suggestions on event planning.
- Promotion of your event to the Columbus Blue Jackets Foundation members and the community through regular advertising venues such as our website, newsletters and internal communications. Game night inventory is not available due to existing sponsorship contracts.

### **The Columbus Blue Jackets Foundation is unable to provide the following:**

- Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees or collecting monies.
- Guarantee volunteer, Board Member, or staff attendance at the event.
- Share any donor lists or contacts.
- Assume responsibility and/or liability of any nature or kind associated directly or indirectly with the event.

# Fundraising Request Form

Group/Organization: \_\_\_\_\_

Contact person: \_\_\_\_\_

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

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

Phone (day): \_\_\_\_\_ (evening): \_\_\_\_\_ (cell): \_\_\_\_\_

E-mail address: \_\_\_\_\_

## **Event Details**

Name of event \_\_\_\_\_

Scheduled Date/Time/Location of Event: \_\_\_\_\_

Target audience: \_\_\_\_\_

Number of expected attendees: \_\_\_\_\_

Brief Description of the Event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will funds be raised? \_\_\_\_\_

What % of the proceeds will be benefiting the Columbus Blue Jackets Foundation: \_\_\_\_\_

Anticipated amount to be raised for Columbus Blue Jackets Foundation: \_\_\_\_\_

Please list any other charitable organizations that will benefit from this event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will the event be promoted? (media partner?): \_\_\_\_\_

\_\_\_\_\_

What can the Columbus Blue Jackets Foundation do to help you with your event? \_\_\_\_\_

\_\_\_\_\_

Please list all confirmed and prospective sponsors, partners you plan to approach to financially support this event:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Will you be asking for donations or contributions from other businesses or organizations for your event? (*Printing, food, drinks, paper products, auction items, etc.*) If so, please list the contact person, organization and items you are requesting

## **Signed Acceptance of Guidelines**

*I have read the Special Events and Promotions Guidelines for the Columbus Blue Jackets Foundation and agree to follow them with regards to holding the proposed event to benefit the Columbus Blue Jackets Foundation. By publicly advertising with the Columbus Blue Jackets Foundation as the recipient of the proceeds of this event, I agree to provide the full amount of the proceeds within 60 days of the event.*

Submitted by \_\_\_\_\_ Title \_\_\_\_\_

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

After reviewing these guidelines, please complete and sign the attached and return it to:

Kate Furman  
Manager of Community Development  
Columbus Blue Jackets Foundation

Fax: 614-246-3738  
Mail: 200 W Nationwide Blvd  
Columbus, OH 43215