HATTIE LARLHAM
THIRD PARTY
FUNDRAISING
TOOLKIT

www.hattielarlham.org

CONTACT FOR INFORMATION AND EVENT SUPPORT:
Wendy Voelker, Development Officer
9772 Diagonal Rd.
Mantua, OH 44255
330-840-6845
wendy.voelker@hattielarlham.org
Thank you for your interest in hosting a fundraiser to benefit Hattie Larlham!

Third-party fundraisers are a great way for supporters and friends of Hattie Larlham to independently raise funds in support of the programs and services we provide for people with intellectual and developmental disabilities.

A third-party fundraiser is an event that is organized, promoted and hosted by a member of the community or an organization. That person or group then donates the event’s proceeds to Hattie Larlham. Civic groups, churches, businesses, fraternities and sororities can organize a fundraiser and the money raised supports programs and services for children and adults with intellectual and developmental disabilities at Hattie Larlham.

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About Hattie Larlham

MISSION

Because we believe that life is sacred, Hattie Larlham enhances the quality of life for people with disabilities and their families through our commitment to comfort, joy and achievement.

HISTORY

As a registered nurse, Hattie Lena Gadd Larlham was frustrated with the lack of assistance programs for children with disabilities. In 1961, Mrs. Larlham witnessed a neighbor’s family struggle from the intensive, 24-hour care required for their baby daughter with inoperable hydrocephalus. Mrs. Larlham, her husband and three children decided to take the child into their home and provide the care she needed.

Mrs. Larlham soon earned a reputation for caring for children with disabilities and at one point had more than 10 children living in her three-bedroom farmhouse. In 1963, with more than 100 children on a waiting list, Mrs. Larlham established the Hattie Larlham Foundation, Inc. Shortly thereafter, the Hattie Larlham Foundation built a facility capable of providing a home for 50 people with disabilities.

TODAY

Our founder had a dream that all people with developmental disabilities would be able to receive the highest quality of care possible. Today, her dream is realized in the efforts of hundreds of employees who provide round-the-clock care to more than 1,700 children and adults with intellectual and developmental disabilities. Since its humble beginnings in the Larlham family farmhouse, the nonprofit organization has grown to include residential services, medical services, work training and community employment services, respite and in-home care, and day programs.

Learn more at www.hattielarlham.org
Get Started

Why?
The individuals served by Hattie Larlham benefit greatly from the awareness and support that your fundraiser creates. Donations provide funding for trips and outings, recreational activities, as well as for critical medical equipment and supplies.

Who?
Anyone can host a fundraising event for Hattie Larlham. It can be as simple as asking co-workers to donate $5 in exchange for a “dress down day” at work. Or maybe a bake sale, a golf outing, or a Zumba-thon. The possibilities are endless. Your personal network – friends, family, coworkers - is the best place to start asking for support, and for finding volunteers, participants, and donations.

When?
Whatever date and time is best for you and your fundraisers. Keep in mind that the larger the event, the more time you will need for planning and implementation.

Where?
Anywhere! Seek locations that will host your event at no cost – lower expenses mean more of the money you raise can benefit the people Hattie Larlham serves.
Fundraising Ideas

- Facebook birthday fundraisers
- Jeans Day / Dress Down Day
- Silent auctions
- Garage / Yard Sale
- Lemonade Stand
- Bake Sale
- Themed Parties
- Home shopping parties – Avon, Mary Kay, Pampered Chef, etc.
- “Spare Change” Collection
- Wine Tastings
- Fashion Shows
- Bowling Fundraisers
- Networking Events/ Mixers
- Team Building Events
- Car Wash Fundraiser
- Book Signings/ Readings
- Mixer/ Speed Dating events
- Golf Outings
- Dinner Parties/ Barbeques
- Pancake Breakfasts
- Spaghetti Dinners
- Sports Tournaments
- Donate a portion of your professional services fee
- (Walk, Bike, Dance, etc.)-A-Thon
- Fitness Events
- Gift Donations- ask for Hattie Larlham donations instead of gifts

- Fraternity/ Sorority events
- Donate a Day of Work Income
- Candy Sales
- Salon Cut-a-Thons
- Movie Night
- Motorcycle Rides
- Restaurant Dine-Out Nights
- Craft Shows
- Pet Walk and Washes
- Teacher/ Principal Challenges
- Holiday Shopping Boutiques
- Holiday Gift Wrapping Fundraiser

...and this is just the beginning!
Step-by-Step Event Planning Checklist

Before the Event:

- Gather a committee or group of volunteers to help plan and implement the event
- Decide the type of event/fundraiser you’d like to hold
  - Your fundraiser should appeal to your audience, brand, mission, goal, budget, expertise and resources.
  - Keep in mind that you are raising money on behalf of Hattie Larlham. Therefore, it’s important to consider the Hattie Larlham brand. Please refer to the Third Party Fundraising Policy (pages 10-12) for details.
- Establish a fundraising goal for the event/ fundraiser
  - Be sure to consider the type of event, your audience, and what you hope to achieve
- Draft a realistic budget
  - Make a list of all possible expenses
  - Determine what could be donated
- Secure a date and location.
- Complete, sign and submit Third Party Fundraising Proposal form (page 9) to Hattie Larlham for approval.
- Be sure to review the Hattie Larlham Third Party Fundraising Policy (pages 10-12) before soliciting funds or promoting your event.
- Secure corporate sponsorships and donations.
- Map out an event timeline and communications plan.
- Compile mailing list and send invitations. Include matching gift information.
- Promote fundraiser as much as possible (see next page for promotional ideas)

HOST A SUCCESSFUL FUNDRAISER!

After the Event:

- Thank attendees and send event summaries to committee members, donors, etc.
- Collect funds and forward donations to Hattie Larlham.
- Submit matching gift request (if your company grants them).
- Hold a post-event discussion with your organization and volunteers to review and assess event goals and outcomes – what worked, what didn’t.
- Pick a date for next year’s event.
- Complete event approval form for next year’s event.
- Begin planning your next event!
How Hattie Larlham Can Help You

Contact Hattie Larlham’s Development Officer to discuss your event. We are happy to advise you in the planning of your event/fundraiser.

**We can offer our help in the following ways:**

- Provide letter of authorization to validate event and organizers
- Draft template for donation letters
- Hattie Larlham logo usage *(needs prior approval from Hattie Larlham)*
- Printed resource materials
- Donor recognition
- Social media promotion (see page 14)
- Event management advice
- Donation collections/recognition
- Check presentation arrangements

**Ways your group can promote your event:**

<table>
<thead>
<tr>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
<th>LinkedIn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Local Event Calendars</td>
<td>Community Bulletin Boards</td>
<td>Email Blasts</td>
</tr>
<tr>
<td>Text invitations</td>
<td>Flyers/posters</td>
<td>Word of mouth</td>
<td>Letters</td>
</tr>
</tbody>
</table>

Be sure to like us on social media, and tag us in all of your posts about your event!

- [Facebook](http://www.facebook.com/hattielarlham)
- [Twitter](https://twitter.com/HattieLarlham)
- [Instagram](https://www.instagram.com/hattie_larlham)
- [YouTube](http://www.youtube.com/user/hattielarlham)
- [LinkedIn](http://www.linkedin.com/companies/hattie-larlham)
How to Collect and Submit Donated Funds

There are several ways to collect and submit donations to Hattie Larlham:

1. You can collect payment directly from donors. After the fundraiser you will send donations to Hattie Larlham. If you accept checks, please make sure they are written out to "Hattie Larlham Foundation." Cash can be dropped off to the Hattie Larlham Foundation at the Main Campus in Mantua – please do NOT send cash through the mail.

2. Credit card donations can be made directly to our Hattie Larlham website (www.hattiellarlham.org). If you choose this option, make sure the Development Officer is aware of the payment made so it can be credited to your event.

3. All forms of payments can be sent directly to the Hattie Larlham Foundation by your donors. Please prepare a form for donors to submit with their donation that includes the name of the fundraising event as well as accurate donor contact information so that Hattie Larlham can send acknowledgment letters.
Important Things to Keep in Mind

Permits/Licenses, Insurance and Expenses

- The Hattie Larlham Foundation cannot incur the costs or complete application forms associated with obtaining permits, licenses and/or insurance for third party events; however, we are happy to provide you with information on how to obtain what is necessary for your event.
- As a charitable organization, we are unable to fund or reimburse expenses incurred throughout the planning and execution of your event.

Event Promotion

- If you would like to use the Hattie Larlham logo on any of your event promotional materials, please complete and forward a sample of the materials for review and approval. This includes any flyers, letters, postcards, etc. Please refer to the Hattie Larlham Third Party Fundraising Policy (pages 10-12) for restrictions on using the Hattie Larlham name and/or logo.
- In order for us to know more about your event, and determine the best way to help you promote it, we ask that you submit the Third Party Event Supplemental Information Form (page 13) after you receive event approval from Hattie Larlham.
- We request a complete list of all of the websites and publications that you will be using to promote your event or use the Hattie Larlham name. Please keep us updated as you post on your social media sites. Please submit the Third Party Event Social Media Request Form (page 14) if you would like to request assistance from us in promoting your event on Hattie Larlham’s social media channels.

Hattie Larlham Staff Support

If you would like for Hattie Larlham representatives to be present at your event, please call the Development Officer at least four (4) weeks prior to your event; please note that we cannot guarantee that a representative will be available.

Charitable Receipts

We are happy to provide a receipt letter to all donors. If you would like us to issue charitable receipts in relation to your event, please discuss this with us in advance so that we can ensure a smooth process. Please note the name, address, and payment information of any individual requesting a letter. We will send a letter to the donor as soon as we receive this information.

When to Submit Event Proceeds and Results

A summary of income and expenses must be maintained and presented to the Hattie Larlham Development Department at the close of the event. We request that proceeds from your event be submitted to Hattie Larlham within forty five (45) days after your event. Please ensure checks are made payable to Hattie Larlham Foundation.
THANK YOU for considering Hattie Larlham as a beneficiary of your fundraising activities. Your efforts will help us enhance the lives of more than 1,700 babies, children and adults with disabilities throughout Ohio. Your generous support is truly appreciated.

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<thead>
<tr>
<th>Individual/Organization Information</th>
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<tbody>
<tr>
<td>Contact Name</td>
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<tr>
<td>Company or Organization Name (if applicable)</td>
</tr>
<tr>
<td>Type of Organization</td>
</tr>
<tr>
<td>❑ Individual (not an organization)  ❑ Business ❑ Club</td>
</tr>
<tr>
<td>❑ Community Group ❑ School ❑ Non-Profit ❑ Faith-based org.</td>
</tr>
<tr>
<td>❑ Other (please describe): __________________________</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>Phone</td>
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<tr>
<td>E-mail</td>
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<tr>
<td>Website (if applicable)</td>
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<tr>
<th>Fundraiser Information</th>
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<tbody>
<tr>
<td>Event Date(s)</td>
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<tr>
<td>Event Time(s)</td>
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<tr>
<td>Event Location</td>
</tr>
<tr>
<td>Describe your third party fundraising event/idea (please use additional sheets if necessary)</td>
</tr>
<tr>
<td>Please list other charitable organizations that will benefit from this event, if any</td>
</tr>
<tr>
<td>What Hattie Larlham materials and information would assist you in planning your fundraiser?</td>
</tr>
</tbody>
</table>

Please return this form to:
Hattie Larlham Foundation
Attn: Wendy Voelker, Development Officer
9772 Diagonal Rd.
Mantua, OH 44255
By email: events@hattielarlham.org

For more information, please contact Wendy Voelker at 330-840-6845 or wendy.voelker@hattielarlham.org

www.hattielarlham.org
THIRD PARTY FUNDRAISING – SPECIAL EVENTS POLICY

We are grateful to all groups interested in fundraising for Hattie Larlham. We want your event to be a success. Please review the following policies and guidelines, which have been designed for the protection of both third-party fundraisers and Hattie Larlham. These are meant to be helpful. For questions, contact Development Officer Wendy Voelker at 330-840-6845 or wendy.voelker@hattielarlham.org.

HOW WE CAN HELP

Hattie Larlham’s ability to provide services for your event is limited by staff size and internal obligations. We can assist in providing the following:

- A letter of authorization to validate the event’s authenticity to help you when seeking sponsorship.
- Items for distribution, if available: Already produced collateral such as brochures or fact sheets about Hattie Larlham and/or copies of FOCUS, a magazine published by Hattie Larlham.
- Publicity on Hattie Larlham’s website, social media platforms and consideration for recognition in our quarterly FOCUS magazine.
- Due to staffing constraints, Hattie Larlham may not be able to send a representative to your event, especially if it occurs outside normal business hours.
- Hattie Larlham is not able to provide volunteers for any external fundraising special event.
- Donor recognition for your event (as it qualifies).

GENERAL POLICIES

- Any fundraising event or promotion that involves the use of the Hattie Larlham name or logo must be approved in advance by Hattie Larlham.
- The Special Event Proposal form for all events must be filled out and approved by Hattie Larlham before contributions can be solicited in the name of Hattie Larlham. The form must be turned in at least six weeks prior to the event. Approval will be granted on a per event basis.
- The name “Hattie Larlham” should not be used for any reason without prior approval.
- Hattie Larlham reserves the right to deny any application for a special event/fundraising program that does not appropriately reflect the mission and values of Hattie Larlham or present a positive image for people with disabilities.
- Hattie Larlham does not release donor, volunteer, employee, client or other mailing lists to outside groups for the purpose of soliciting funds.
- Hattie Larlham does not advance money or solicit sponsorship revenue for outside fundraising activities.
- Approved events that violate any of Hattie Larlham’s third party fundraiser policies will be subject to immediate cancellation.

For annual events, applicants must reapply every year for approval. All proceeds from the previous year’s event must be received by the Hattie Larlham Development Department before approval of future events is granted.
LEGAL POLICIES – FOR YOUR PROTECTION AND OURS

- Hattie Larlham and its family of agencies are not liable for any injuries sustained by event volunteers or participants related to an event benefiting Hattie Larlham and cannot assume any liability for your event.
- All third party event planners are responsible for obtaining any necessary permits, licenses, or insurance required.
- No contracts or service agreements should be signed before event approval is granted. A copy of all contracts and agreements must be reviewed and approved by the Hattie Larlham Foundation.

EVENTS THAT CANNOT BE APPROVED

These include activities involving any of the following:

- Events that require any financing from Hattie Larlham. **All events must be financed solely by the third party or third party event sponsors.**
- Events that involve a professional fundraiser, telemarketer, and/or involves an agreement to raise funds on a commission, bonus or percentage basis.
- Events that require Hattie Larlham’s endorsement of a product or service, or participation in the direct sale of a product or service.
- Events that compete or conflict with an already established or scheduled event to benefit Hattie Larlham.
- Events that fail to comply with any municipal, county, state, and/or federal law.
- Events that involve the promotion of a political party or candidate, or that appear to endorse political issues.
- Events that are sponsored by an alcoholic beverage, bar or tobacco product or distributor. Furthermore, liquor permits may not be obtained using Hattie Larlham’s name.
- **Ohio legislation passed July 2003 prohibits any individual, company or organization that is not a registered non-profit from holding raffles of any kind (bingo is only allowed by registered non-profits; however, permission must be gained from the state).** Please contact your local legislators or chamber of commerce if you need more information.

PUBLICITY GUIDELINES

- You may not reach out to members of the press on behalf of Hattie Larlham for your event. If you wish to promote your event with the media using the Hattie Larlham name, you must obtain written approval from Hattie Larlham.
- Copies of all event publicity must be submitted to Hattie Larlham for approval prior to distribution. All marketing and promotional activity for third party events must be approved in advance by the Corporate Communications Department.
- Publicity may not suggest that the event is being sponsored or co-sponsored by Hattie Larlham or that Hattie Larlham is involved in any way except as the beneficiary. The suggested way to describe Hattie Larlham is to list the event name followed by “benefiting the Hattie Larlham Foundation”. Please state how Hattie Larlham is to benefit, i.e. “net proceeds” or “% of sales.”
- The name Hattie Larlham or any modification of the name, i.e. “Hattie’s Kids”, may not be used in the title or name of an event.
- In the event of a cancellation, the organizer is responsible for removing all marketing and promotional material and notifying participants of the event’s cancellation.

GUIDELINES FOR USE OF HATTIE LARLHAM’S LOGO

- The sponsoring organization’s name and/or logo must appear in a prominent location in all advertising and promotional material.
- The Hattie Larlham logo may be used in conjunction with the Hattie Larlham name.
- The Hattie Larlham logo may only be reproduced in its original Hattie Larlham colors.
FINANCIAL GUIDELINES

- Please limit expenses to 35% of the total raised by the event. **Third party event organizers are responsible for payment of all event expenses.** If the event expenses are greater than the total collected, the third party holding the event is responsible for payment of these additional expenses.

- If Hattie Larlham is designated or portrayed to the public as sole beneficiary, then Hattie Larlham is to receive 100% of the net proceeds.

- If the sponsoring organization or any other charity in addition to Hattie Larlham is a beneficiary, this information must be clearly stated in all materials and distribution of the proceeds must be made on an equitable basis agreed upon in advance by Hattie Larlham.

- Bank accounts in the name of Hattie Larlham or the Hattie Larlham Foundation are not permitted.

INTERNAL REVENUE SERVICE CODES MUST BE FOLLOWED

- The percent or dollar value of admission price, which is tax deductible, must be clearly identified to the purchaser. The fair market value of items, benefits, services or privileges must be determined and clearly stated on all advertising copy, including invitations, tickets, programs, posters, etc., issued.

- Terms such as “tax deductible” or “donation” may not be used on promotional material when the full amount does not qualify as a deduction under IRS regulations.

- The underwriting of the costs by the organization or private persons has no bearing on the value of benefits, and refusal of the benefits has no bearing on deductibility. The full amount of the contribution is deductible where the benefit received by the donor has an insignificant or insubstantial value:
  1) The fair market value of all benefits is not more than $50.00 or 2% of the donation, or
  2) The donation is $25 and the only benefits received are token items such as bookmarks, calendars, key chains, mugs, posters, t-shirts, etc.

A summary of income and expenses must be maintained and presented to the Hattie Larlham Development Department at the close of the event by the sponsoring organization. Hattie Larlham Foundation must receive net proceeds within **45 DAYS** of the event’s conclusion.

At the completion of your event any forms and checks (made payable to **Hattie Larlham Foundation**) should be mailed/delivered to:

**Hattie Larlham Foundation, ATTN: Wendy Voelker**

**9772 Diagonal Rd., Mantua OH 44255**

I and/or my organization acknowledge that we have fully read and understand the Hattie Larlham Third Party Fundraising – Special Events Policy. I and/or my organization hereby agree to be bound by all of the terms of the Special Events Policy. I and/or my organization hereby agrees to indemnify, defend, and hold harmless Hattie Larlham and its respective agents, officers, employee, subsidiaries, and/or assigns from and against any and all losses, damages, liabilities, deficiencies, actions, claims, costs and expenses, including but not limited to reasonable attorney fees; of every kind, nature or description whatsoever; that may arise out of the fundraising activity that is being conducted in support of Hattie Larlham.

**For third party organizer:**

| Print Name: | ____________________________ |
| Title: | ____________________________ |
| Signature: | ____________________________ |
| Date: | ____________________________ |

**For Hattie Larlham:**

| Print Name: | ____________________________ |
| Title: | ____________________________ |
| Signature: | ____________________________ |
| Date: | ____________________________ |

Authority: CFR: None, DODD: None, CHAP: Reviewer: Development Director, Foundation Board, Executive Committee REVISED: 1/19; 11.04 POLICY
**Fundraiser Information**

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<tr>
<th>Event Name</th>
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<tbody>
<tr>
<td>Presenting Organization</td>
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<tr>
<td>Event Date/Time/Location</td>
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<tr>
<td>Event Contact Information</td>
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**Will Hattie Larlham have the opportunity to set up an information table?**
*(Please note: we cannot guarantee Hattie Larlham staff will be able to attend)*

<table>
<thead>
<tr>
<th>What is the schedule of events? Please describe here, or attach a flyer/schedule.</th>
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<tbody>
<tr>
<td>What kind of music or other entertainment will be at the event?</td>
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<tr>
<td>Will food and/or drinks be available? Will alcohol be served?</td>
<td></td>
</tr>
<tr>
<td>Will there be auction items or prizes?</td>
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</tr>
<tr>
<td>Is there anything else you wish to tell us about your event?</td>
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</tr>
</tbody>
</table>

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**If you have any questions, please contact Wendy Voelker at 330-840-6845 or wendy.voelker@hattielarlham.org**

**www.hattielarlham.org**
Third Party Event
Social Media Request Form

If your group would like Hattie Larlham to promote your event on Facebook, Twitter, Instagram or LinkedIn, you must submit this form at least two weeks prior to your scheduled event.

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<tr>
<th>Company or Organization Name</th>
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<tbody>
<tr>
<td>Contact Name/Title</td>
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</tr>
<tr>
<td>Address</td>
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<tr>
<td>Phone</td>
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<tr>
<td>E-mail</td>
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<td>Website (if applicable)</td>
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<table>
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<tr>
<th>Event Name</th>
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<tbody>
<tr>
<td>Event Date(s)</td>
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<tr>
<td>Event Time(s) – start and end</td>
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<tr>
<td>Event Location (include address)</td>
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<table>
<thead>
<tr>
<th>Event Description</th>
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<table>
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<tr>
<th>What is your expected attendance?</th>
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<tbody>
<tr>
<td>What is your fundraising goal?</td>
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</table>

<table>
<thead>
<tr>
<th>List all online locations that you will be promoting your event (please provide specific URLs if applicable)</th>
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</thead>
</table>

Please email this completed form, along with your registration form (PDF preferred) and any graphics/logos you would like us to use in promotions, to wendy.voelker@hattielarlham.org.

For more information, please contact Wendy Voelker at 330-840-6845 or wendy.voelker@hattielarlham.org

www.hattielarlham.org
Thank you for hosting a fundraiser to benefit Hattie Larlham!

We are grateful for your support!

Contact:
Wendy Voelker, Development Officer
Hattie Larlham Foundation
9772 Diagonal Rd.
Mantua, OH 44255
(330) 840-6845
Wendy.voelker@hattielarlham.org

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