



National Blood Clot Alliance

Stop The Clot[®]

Toolkit:

Hosting Special Events

Step by Step Special Event Planning

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Introduction

The National Blood Clot Alliance appreciates your interest in learning how to plan and implement special event fundraisers to benefit our organization.

Fundraising activities aimed at raising awareness and financial support help NBCA fund its overall mission – to prevent, diagnose and treat thrombosis and thrombophilia through research, education, support and advocacy.

Local volunteer organized special events such as a Stop The Clot® Walk, Golf Tournament, Auction (silent, live or online) or other activities are tremendous opportunities to rally support for National Blood Clot Alliance, while providing valuable information about blood clots and clotting disorders.

We look forward to working with you in ensuring the best possible outcome for your fundraising activities!

With Thanks To:

We are most grateful to board member, Stephanie Davis, for her inspiration and creativity in developing these guidelines. We extend our appreciation also to the members of the National Blood Clot Alliance's Development Committee:

Mike Hefron, Chair – Justin Barch – Kate Gray – Traci Wilkes Smith

Alan P. Brownstein
CEO

Judi Kaplan Elkin
Director of Regional Development and Education

Kristen Holgerson
Director of Development

Hosting Special Events

We are extremely grateful to all who wish to organize special events in support of the National Blood Clot Alliance (NBCA). NBCA is recognized as the premier community-based organization dedicated to prevention and treatment issues in thrombosis and thrombophilia in the United States.

One of our key objectives is to create a grassroots advocacy and fund-raising network. This is being accomplished through our NATHlete program for individuals, and through third-party events for groups. We need and appreciate your financial support and your energy to help our family, friends and neighbors fight the debilitating conditions caused by blood clots.

For your convenience we have created this [step by step special event toolkit](#) that will take you through the entire process.

Prior to beginning your fund-raising efforts, please contact NBCA Director of Regional Development and Education, Judi Kaplan Elkin, at jelkin@stoptheclot.org to discuss your special event. Once NBCA has approved your event, the following guidelines must be followed:

- The NBCA may only be identified as the beneficiary of the event. For example, event organizers should not call an event, the National Blood Clot Alliance “Walk-a-thon.” The event should be promoted as the “Walk-a-thon to benefit the National Blood Clot Alliance.”
- The National Blood Clot Alliance is not financially or otherwise liable for the promotion or execution of special events.
- If donations are deposited to a separate account outside NBCA and subsequently donated in a single sum to NBCA, only the individual, organization, etc. whose name appears on the check will receive tax benefits for the donation.
- All donations should be made by check payable to the National Blood Clot Alliance.

Thank You for Your Support!

Ten Steps to A Successful Fundraising Event

- 1. Establish a goal/purpose for your event.** Before you even begin to plan your event, you need to think about why you are doing it and what you hope to achieve by having it.
- 2. Determine what type of event you want to organize.** Decide what type of event will be most appropriate and enjoyable for you, your friends, your family and your community. It is important to choose an event that will attract attention and attract the most volunteers and participants.
- 3. Determine the fundraising components of your event.** How will you raise money? Auctions, raffles, corporate sponsorships, individual donor gifts, ticket sales and registration fees are all ways in which you can raise significant funds for National Blood Clot Alliance.
- 4. Prepare a budget.** Establish your fundraising goals and develop a list of expenses that you may incur throughout the planning process. Always think about what you can have donated to keep your expenses at a minimum. See pages 13 and 14 for additional budget information.
- 5. Confirm a date.** It takes a minimum of 3-6 months to organize a successful event. Give yourself enough time to plan all of the logistical details and to publicize it appropriately. Avoid scheduling an event on a holiday, holiday weekend, or on the same day as another major event.
- 6. Fill out and submit the NBCA Special Events Proposal Form (page 11), Special Event Budget form (page 14), and read and sign the Special Events Agreement document (page 12).** Anyone organizing a fundraising event for NBCA needs to complete this pre-event paperwork and submit it to the Director of Regional Development and Education for approval before beginning to plan their event. By completing this paperwork, you are enabling us to provide the support and guidance that you deserve.
- 7. Enlist your friends!** It's important for you to remember that one person can't do it all! A small committee will be a tremendous help in taking on specific responsibilities. Form a committee of your close friends, family, colleagues and community members to help you manage the logistics involved with event planning. Delegate projects amongst your committee members. Your committee will provide the leadership and assistance you need to organize and execute a successful event.
- 8. Select a location.** When searching for a venue, consider the type of event you are planning and what would enhance your fundraiser. Will you be running an indoor or outdoor event? For an *indoor* event, you should consider the following as you begin planning: All factors affecting safety – what needs to be done or checked? Is there adequate parking? Are there adequate restroom facilities? Is a microphone or public address (PA) system available? Are there enough electrical outlets? Are there tables and chairs, or must they be rented? Should you hire police or janitorial services? How many people can the site accommodate? Is there wheelchair access? Can you bring

in food and beverages? Do you need a special permit, police clearance or other authorization? For an *outdoor* event, you may be able to attract a larger number of participants, but in addition to the above, you should also consider: Whether you need to set a rain date; Clearing your walk/race/bike route by securing a special events permit; requiring checkpoints and checkers along the route; arranging for trash pick-up.

9. Develop a timeline. Once you have decided on the type of event, the date, location and committee, developing a timeline is the next step. It is important to map out what needs to be done and when. A timeline will help you keep track of who is responsible for what and when it needs to be completed.

10. Thank You! Be sure to thank all of your supporters, committee members, sponsors etc. in a timely manner (two weeks or less).

Event Planning

A. Working Together With The National Blood Clot Alliance

1. Submit your three documents

Once you have completed and submitted your Special Events Proposal, Budget and Agreement we will be in contact with you to offer our assistance.

2. Presenting a letter of endorsement

We will send you an endorsement letter that states that NBCA supports your fundraising efforts. You will find this letter helpful as you seek to acquire services or goods for your event. You may also find that some individuals who wish to contribute will do so only if they have written proof that you are representing a charitable organization.

3. Supplying NBCA Brochures and Reports

Often a special event can serve a two-fold purpose. One, it raises money for an important cause; and two, it provides a forum for educating the public. We have a number of informative brochures and pamphlets that can help individuals attending your event better understand the mission, goals, and achievements of the National Blood Clot Alliance.

4. Providing Helpful Advice

We whole-heartedly support the imaginations of our volunteers as they come up with fundraising ideas. There are a number of helpful hints which we may be able to share with you as the planning process gets underway.

B. Helpful Hints

1. Insurance and Waiver for Liability

If you are conducting your event at a public site, you should be sure that there is a liability insurance policy in effect to protect the owners of the site and you and your community against a suit if someone is injured at your event.

If the site is not covered by a “blanket” liability policy, then it is necessary to obtain temporary coverage, a “rider” for your specific event. NBCA will be happy to provide that rider, upon receipt of certain information. Please contact Kristen Holgerson at kholgerson@stoptheclot.org for assistance in obtaining your rider.

A “Waiver of Liability” is a written statement that the event's participants must sign before participating. In most instances, it is considered a legally binding document. It effectively releases anyone associated with the event from responsibility and liability for injuries sustained by participants at that event.

2. FirstGiving....A Great Tool for Online Fundraising!

If you are running an event that requires collecting pledges, encourage the participants to set up their FirstGiving page so that they can share their story, and many of their pledges can be received online, in advance of the event. And, a good idea for a pledge-based event is to set a required minimum for the participants to collect (for example, they must have \$100 in pledges at the start of the event). Check out our FirstGiving page at <http://www.firstgiving.com/natt>.

3. Use Your Timeline

As you adjust your checklist and timeline, keep all of your updates and note when any modifications to the list occurred.

4. Keep Everyone Informed

Keep your committee volunteers informed—there can never be too much communication. Meet regularly at a consistent time (i.e., the third Monday of every month) and at the same location.

5. Delegate!

Trust your volunteers to carry out tasks with enthusiasm and competence. Be encouraging when they need a little push.

And, remember... why people volunteer?

- One in twenty people has had his or her life touched by hereditary thrombophilia, and wants to join in the fight against the disease.
- Enjoyment and sense of pride that comes from being involved with the fight against clotting disorders.
- Desire to meet new people with a common interest.
- To be better informed about thrombosis and thrombophilia research and treatment.
- Time to spare and talents to share.

C. General Financial Information

1. Using Your Budget

Depending on the nature of your event, you will need to purchase services and supplies. These costs have to be planned for *in advance* and your budget will insure that you anticipate these expenses. As you look at the costs expected, identify the items that can be donated as in-kind gifts or services. Look within your community for organizations or businesses that might be interested in donating a product, service or cash contribution. Look to companies with whom your volunteer committee members have affiliations.

2. Receipts and Tax-Deductibility of Charitable Donations

IT IS REQUIRED BY LAW that if you are giving something in return for the cost of a ticket, then you must state on the ticket how much of the total purchase price is tax-deductible. The best example of this is" Jane Doe buys a \$100 ticket to your movie premier. She will receive cocktails and hors d'ouerves and the movie as part of having purchased her ticket. You estimate the "fair market value" to be a \$40/person for food and beverage and another \$20/person for entertainment. Therefore, Jane Doe is really receiving \$65 worth of services. According to the IRS, only \$40 of her ticket is tax deductible ($\$100 - \$60 = \$40$).

If you have an auction remember each auction item should be valued at Fair Market Value. This value must be listed on the Bid Sheet at the auction table, as well as in any printed list of the auction items that will be distributed.

Purchases of raffle tickets, lottery or any game of chance are not tax-deductible.

3. Think About Sponsors

- Sponsorship is the use of financial or in-kind support of a special event by a corporate organization to achieve both the non-profit and specified business goals. There are different types of sponsorship opportunities, including exclusive or title sponsor, a presenting sponsor, co-sponsor, media sponsor, or in-kind sponsor.
- When working with a sponsor you should do the following:
- Look at the strengths of the event and how they can be made stronger to benefit both the sponsor and the NBCA. Analyze competition. Look at changes that can be made to keep an event fresh. Use creativity and provide something unique.
- Define sponsorship opportunities and the benefits of corporate giving. Define opportunities for brand promotion. Does it reach a wide cross-section of the community? Determining what there is to offer from the event narrows the focus of who should be approached regarding sponsorship.

- A sponsor can donate:
 - Financial support
 - An ad
 - The event site
 - Printing
 - Prizes
 - Entertainment
 - Tee shirts, hats or other goods
 - Auction items or raffle prizes
 - Food and/or beverages
- Things that you can offer a sponsor include their logo on banners, signage, posters, recognition on the brochure and the program, verbal credit, a chance to display their product, image-building, and good corporate citizenship. The biggest attractions are awareness and image, and trial or sampling opportunities for their products.
- Develop a list of potential sponsors. Be sure to check the names and titles of those who handle sponsorship for each company so that you approach the right person.
- Try to figure out a bit about the company/organization's business and giving history. This way you will get useful information regarding the sponsor that can be incorporated into a strategy that best meets their needs.
- Set up a sponsorship package and define very clearly what your sponsor will get in return for their support. For example, publicity to enhance a company's image; earning goodwill by providing customer, client or employee hospitality opportunity through free tickets; direct sales or sampling opportunities; and a chance for a company to build their image by supporting a charity. Depending on the sponsor's needs, your package will differ.

D. Completion and Continuity—What To Do When the Event Is Over

Congratulate yourself! You and your volunteers have done a great job in helping NBCA. Plan to hold a follow-up meeting to take a close look at all of the components of the event.

Most importantly, say "Thank You" to your supporters and volunteers. You can't do it too often or too loudly. Make sure to thank your committee first. You want this core group to stay intact if you want the event to become an *annual* fundraiser.

Next, send acknowledgements to your corporate/individual sponsors. You want them back with you next year as well.

Last, but by no means least, send a letter of thanks and appreciation to the individuals who attended or participated in your event (and those who were supporters).

There is a lot of thanking to do, but it is those letters of appreciation that people remember, and they will most likely be the ones enthusiastic about supporting your next event. You might be asking how you are to keep track of all these companies, donors, participants, etc. One way would be to retain a list of these names in a computer for future reference. If you don't have a computer, keep careful records, including notes from meetings, letters of thanks, letters requesting sponsorship, names and addresses of participants/attendees.

Good Luck!

Special Event Proposal Form

Proposed Event: _____

Date / Time: _____ Location: _____

Contact Person: _____

Street: _____

City, State, Zip _____

Phone: _____ Email: _____

Event description: _____

Have you held a fundraiser for us before? Yes No

How will you raise money through this event? _____

Have you formed a committee to help organize this event? Yes No

How will you promote this event? _____

Why are you choosing to do a special event for the National Blood Clot Alliance?

Fundraising goal: _____ Projected expenses: _____

Please attach a detailed budget

Is National Blood Clot Alliance the sole beneficiary of the proceeds? Yes No

If not, please explain. _____

Please complete this form and send it, along with your proposed budget and special event agreement to:

Judi Kaplan Elkin | Director of Regional Development and Education | National Blood Clot Alliance

103 Brook Road | Sharon, MA 02067
T: 617.529.1054 F: 781.784.5531 E: jelkin@stoptheclot.org

Special Event Agreement

As a volunteer organizing an event to benefit the National Blood Clot Alliance, you will receive the following support:

- Use of the National Blood Clot Alliance name and logo to be used when indicating the beneficiary of your event.
- An IRS letter with the National Blood Clot Alliance's federal tax identification number.
- Liability insurance coverage up to \$1 million for participants, volunteers and event location as needed.
- The use of our FirstGiving platform for receiving online donations.
- An NBCA staff person will be assigned to serve as your main contact for the organization. NBCA has professional fundraisers on staff to advise you.

In order to receive the support as indicated above, the National Blood Clot Alliance requests that volunteers comply with the items listed below. It is important that volunteers comply with our policies as they protect our organization's corporate identity and reputation and ensure that we are in compliance with IRS regulations.

- The National Blood Clot Alliance name should always be spelled out and no adaptations or color changes should be made to our logo. Please do not refer to the organization using the NBCA abbreviation.
- Checks should be made payable to the National Blood Clot Alliance.
- The National Blood Clot Alliance accepts major credit cards (AMEX, MasterCard and Visa). Staff can process the charges if you send us the original signed form or copies of the signed form (RSVP card, flyer, etc.) directly to the National Blood Clot Alliance. Each donor's name, address, telephone number, credit card number, expiration date and signature are needed in order to process the charge. All charges should be sent to NBCA in a timely manner, so that the donor does not dispute the charge.

Volunteer Name: _____

Signature: _____

Date: _____

Please complete this form and send it, along with your proposed budget and special event proposal form to:

Judi Kaplan Elkin | Director of Regional Development and Education | National Blood Clot Alliance

103 Brook Road | Sharon, MA 02067
T: 617.529.1054 F: 781.784.5531 E: jelkin@stoptheclot.org

How to Budget for a Special Event

A. Step 1

You know you need to make income from your event, but the most common mistake in budgeting for it is to try to figure out all your income and expenses, see what's left, and make that your goal. This approach will often leave you frustrated with little to show for your efforts. To succeed, set your income goal FIRST, and work "backwards" into your budget. Here's an example to get you started on the right path.

B. Step 2

In creating this example, we'll assume you've done your homework and the event that you are planning on producing has the potential to create income through underwriting (sponsorship), advertising and the price of attending the event. Once you've reached this stage, you're ready to set the goal for how much money you hope to make from this event. In our example, let's assume that goal is \$5,000.

C. Step 3

The next step is to put together a list of all the "knowns" in your budget. For example, if you have underwriting and advertising in these amounts. For now, leave the price of the event to be determined.

D. Step 4

The more difficult step is determining exactly what all of your expenses will be. If you've done a similar event in the past, you will have those financial records as a reference. If this is a first time event, National Blood Clot Alliance staff will be happy to help you in estimating these expenses.

E. Step 5

With your income projections in place and your expenses calculated, you can now move to the most important step and that is the pricing of the event ticket.

If your known income is \$15,000 in underwriting and advertising and your projected expenses are \$25,000 to produce the event, what happens next? To make \$5,000 from the event, you can already see that you will have to generate \$10,000 in event sales just to break even plus an additional \$5,000 to reach your event goal. Knowing these figures, gives you flexibility in your pricing. Are you looking for more people to attend at a lower price or fewer people with a higher price? In continuing our example then, you can see that you will need a total of \$15,000 in event sales to reach your goal. You can charge \$50 per person and look for 400 people to attend or you can charge \$150 per person and reach the same goal.

F. Step 6

Knowing this information is what will shape your marketing strategies as you promote your event. Remember, start with the end goal in mind and your time and effort will produce tangible results.

Special Event Budget Worksheet

Submitted by: _____	Event Date: _____
City, State: _____	Event Net Goal: _____

Sponsorships	Name	Revenue
Title	_____	\$ _____
Other	_____	\$ _____
Individuals	_____ @ _____	\$ _____
	<i>Number of</i>	<i>per \$ amount</i>
Tables	_____ @ _____	\$ _____
	<i>Number of</i>	<i>per \$ amount</i>
Other Income		
Ad Book		\$ _____
Live Auction		\$ _____
Silent Auction		\$ _____
Raffle		\$ _____
Contributions		\$ _____
Pledges		\$ _____

TOTAL REVENUE	\$ _____
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Attendee Benefits (non-deductible) Information	Cost / Person	Total Cost
Food / Beverage	\$ _____	\$ _____
Venue	\$ _____	\$ _____
Decorations	\$ _____	\$ _____
Entertainment	\$ _____	\$ _____
Other (i.e. t-shirts etc.)	\$ _____	\$ _____
Total Benefits:	\$ _____	

Total Benefits Cost Per Person \$ _____

These are the costs for the benefits received by attendees/participants. To calculate the tax-deductible portion of a ticket, deduct the benefit cost from the total participation fee.

Other Expense Information	
Printing	\$ _____
Postage	\$ _____
Signage	\$ _____
Other (specify)	\$ _____

TOTAL EXPENSES	\$ _____
TOTAL COSTS (Benefits + Expenses)	\$ _____
TOTAL NET REVENUE	\$ _____