



Stop The Clot®

National Blood Clot Alliance

Toolkit:

Hosting Special Events

Step by Step Special Event Planning

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* Note: Please complete pages 9, 10 and 12 and send them by email to
Caitlin Augustine | E: caugustine@stoptheclot.org | National Blood Clot Alliance

Introduction

The National Blood Clot Alliance appreciates your interest in learning how to plan and implement special event fundraisers to benefit our organization. We are happy to provide you with this step-by-step [Special Event Toolkit](#) to guide you through the entire process.

Fundraising activities aimed at raising awareness and financial support help NBCA fund its overall mission – dedicated to advancing the prevention, early diagnosis and successful treatment of life-threatening blood clots such as deep vein thrombosis, pulmonary embolism, and clot-provoked stroke.

Local volunteer organized special events such as a Stop The Clot® Walk, Golf Tournament, 5k, or other activities are tremendous opportunities to rally support for the National Blood Clot Alliance, while raising awareness about blood clots and clotting disorders. These events provide a chance for dedicated volunteers to implement our important mission at the local level. And, it could mean an opportunity to save a life. Raise awareness. Save a life. Together, we can make it happen.

We thank you for your interest, and look forward to working with you in the months ahead to ensure the best possible outcome for your event.

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Ten Steps to a Successful Fundraising Event

- 1. Establish a goal/purpose for your event.** Before you begin to plan your event, you should think about why you are hosting the event 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 appeal to the most volunteers and participants.
- 3. Determine the fundraising components of your event.** How will you raise money? Auctions, raffles, corporate sponsorships, individual donations and personal solicitations, ticket sales and registration fees are all ways in which you can raise significant funds for NBCA.
- 4. 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, please 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; make arrangements to clear your walk/race/bike route by securing a special events permit; requiring checkpoints and checkers along the route; arranging for trash pick-up etc.

- 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. Prepare a budget.** Establish your fundraising goals and develop a list of expenses that you expect to incur throughout the planning process. Always think about what goods and services can be donated to keep your expenses at a minimum. See pages 11 and 12 for additional budget information.
- 7. Three important forms.** Please fill out the NBCA Special Events Proposal Form (page 9) read and sign the Special Events Agreement Form (page 10), and complete the Special Event Budget Worksheet (page 12). These three forms should be submitted at least four months in advance of your event via email to caugustine@stoptheclot.org. By completing this paperwork, it enables us to provide the support and guidance that you deserve. Once we receive your forms, we'll reach out to you to set up a call and help to get you on your way!

- 8. 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 among your committee members. Your committee will provide the leadership and assistance you need to organize and execute a successful event.
- 9. Develop a timeline.** Once you have decided on the type of event, 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.

Working Together with the National Blood Clot Alliance

A. Ready, Set, Go!

1. Submit your three documents

Once you have completed and submitted your Special Events Proposal, Budget and Agreement we will contact 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. Access to NBCA information and materials

Often a special event serves a two-fold purpose. First, it raises money for an important cause; and second, it provides a forum for raising awareness and educating the public. We are happy to provide information and materials, as well as excellent web links and social media platforms to help individuals attending your event better understand the mission, goals, and achievements of the National Blood Clot Alliance.

4. Insurance and Waiver of Liability

If you are conducting your event at a public site, you should be sure there is a liability insurance policy in effect to protect the owners of the site, as well as yourself and the community, against a potential lawsuit 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, e.g. a "rider", for your specific event. NBCA will be happy to provide that rider upon receipt of certain information. Please let us know early in the process so that we obtain the rider well in advance of your event.

A "Waiver of Liability" is a written statement that the event's participants must sign before participating. This is typically used for Walks, Runs or other athletic events. 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.

5. CrowdRise....A Great Tool for Online Fundraising!

If you are running an event that requires collecting pledges, selling tickets or creating a personal online appeal, we suggest using our CrowdRise platform to create a fundraising portal and event website. We'll work closely with you in setting up your CrowdRise page tailored to your event.

6. Use Your Timeline and Your Budget

As you adjust your timeline and budget, keep all of your updates and notes documented to reflect any modifications.

7. Keep Everyone Informed

Keep us and your committee volunteers informed - there can never be too much communication!

8. Delegate!

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

9. Providing Helpful Advice

We whole heartedly support the imaginations of our volunteers as they create and implement fundraising ideas. There are a number of helpful hints which we may be able to share with you as the planning process gets underway, and we are always happy to provide our input.

B. Important Financial Information

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, you must state on the ticket how much of the total purchase price is tax-deductible. The best example of this is - Jane 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 \$60 worth of services. According to the IRS, only \$40 of her ticket is tax deductible ($\$100 - \$60 = \$40$).

If you host 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.

C. Event Sponsorship

Sponsorship is the use of financial or in-kind support of a special event by a company or community service organization. There are different types of sponsorship opportunities, including exclusive or title 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 perspective of the sponsor narrows the focus of who should be approached regarding sponsorship.
- A sponsor can donate:
 - Financial support
 - An ad
 - Venue for event
 - Printing
 - Prizes
 - Entertainment
 - T-shirts, hats or other goods
 - Auction items or raffle prizes
 - Food and/or beverages
- Things that you can offer a sponsor include adding their logo to banners, signage and posters, recognition on the brochure and the program, verbal recognition, 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 local sponsors. Be sure to check the names and titles of those who handle sponsorship for each company so that you approach the right person. *Please do not approach any National companies for sponsors prior to notifying NBCA of your intent.*
- Try to figure out a bit about the company/organization's business and giving history. This way you will obtain 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 receive 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.

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 and raising awareness. 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 say 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 be done, 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 database, such as Excel, for future reference. If don’t want to use a computer, keep careful records, including notes from meetings, letters of thanks, letters requesting sponsorship and the names and addresses of participants/attendees.

Thank you for making a difference!

Special Event Proposal Form

National Blood Clot Alliance

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: _____

Will your event require:

Liability Insurance Rider: Yes No

Waiver of Liability for Participant: Yes No

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

Caitlin Augustine | caugustine@stoptheclot.org | National Blood Clot Alliance

Special Event Agreement

National Blood Clot Alliance

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

- Use of the National Blood Clot Alliance name and logo to be used when indicating the beneficiary of your event.
- An IRS letter containing 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 CrowdRise platform.
- An NBCA Development / Regional Affairs staff member assigned to serve as your main contact and advisor.

In order to receive the support as indicated above, the National Blood Clot Alliance requires that volunteers comply with the items listed below. These important policies protect NBCA's corporate identity, trademark and reputation while ensuring that we are in compliance with IRS regulations for non-profit 501 (c)3 organizations.

- 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 must be made payable to the National Blood Clot Alliance and sent to us within 7 days of receipt.
- The National Blood Clot Alliance accepts major credit cards (AMEX, MasterCard and Visa) through CrowdRise, our secure online fundraising portal.
- The use of the phrase *Stop The Clot*[®] must always be trademarked.
- Event related Facebook pages, websites, media, signage, and all promotional materials containing our logo, name or Stop The Clot[®] trademark must be approved prior to launching or usage.
- The NBCA may only be identified as the beneficiary of the event. For example, organizers should not call the fundraiser, the National Blood Clot Alliance "*Name of Event*" The fundraiser should be promoted as the "*Name of Event*" 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.
- All donations should be made by check payable to the National Blood Clot Alliance and either mailed directly to NBCA by the donor, or, if given to a volunteer, should be mailed to NBCA within 7 days of receipt. Please let us know in advance if a donor will be sending payment directly to us, so that we can ensure that it is credited properly to your event.

Volunteer Name: _____

Signature: _____ Date: _____

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

Caitlin Augustine | E: caugustine@stopthecлот.org | National Blood Clot Alliance

How to Budget for a Special Event

You know you need to generate income for a “fundraising” event, but the most common challenge in budgeting 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.

Step 1: Fundraising Goal

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 \$10,000.

Step 2: Expenses

The more difficult step is determining exactly what all of your expenses will be. If you have held a similar event in the past, you will already 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. For the purposes of this example, assume the expenses to produce the event will total \$1,500.

Step 3: Event Pricing

With your fundraising goal and projected expenses in place, you can now move to the most important step and that is determining the overall fundraising goal. Using both your fundraising goal and projected expenses, we can determine how to price the event to meet your goals. If your goal is to raise \$10,000 and your expenses will be \$1,500, you will need to raise \$11,500 to net your goal of \$10,000 ($\$11,500 \text{ minus } \$1,500 = 10,000$).

Fundraising Goal	\$10,000
Projected Expenses	\$1,500
Expenses + Fundraising Goal = \$11,500	

By calculating these figures, you can determine your pricing. Would you prefer that more people attend the event at a lower price, or fewer people attend at a higher price? Either way, the fundraising goal is the same.

230 people attend @ \$50 each=\$11,500

OR

100 people attend @ \$115 each=\$11,500

Knowing this information will allow you to 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

National Blood Clot Alliance

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

Sponsorships	Sponsor Name(s)	Income
Title @ \$ _____	_____	\$ _____
Other @ \$ _____ ea	_____	\$ _____

Individuals	_____ @ _____	\$ _____
	<i>Number of tickets per \$ amount</i>	

Other Income	
Auction	\$ _____
Raffle	\$ _____
Contributions	\$ _____
Other (specify) _____	\$ _____

TOTAL INCOME	\$ _____
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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:	A	\$ _____ A

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 ticket fee.

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

TOTAL EXPENSES A & B	\$ _____
---------------------------------	-----------------

TOTAL NET REVENUE (Income - Expenses)	\$ _____
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Please complete this form, along with your special event proposal and special event agreement and send to:

Caitlin Augustine | E: caugustine@stopthecлот.org | National Blood Clot Alliance