

# External Fundraising Proposal

Thank you for your interest in planning a fundraiser for the Ruth Asawa San Francisco School of the Arts! If your fundraiser will involve the Friends of School of the Arts Foundation, please complete this form and return it to the following address six-weeks prior to your event.



FoSOTA | Attn: External Fundraiser | 236 West Portal Avenue #844 | San Francisco, CA 94127

## FUNDRAISING GROUP CONTACT INFORMATION

Today's Date: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email \_\_\_\_\_

Address/City/State/Zip \_\_\_\_\_

Phone: (H) \_\_\_\_\_ (O) \_\_\_\_\_ (CELL) \_\_\_\_\_

Company/Organization, if applicable: \_\_\_\_\_

Company/Organization Website, if applicable: \_\_\_\_\_

## INFORMATION REGARDING PROPOSED EVENT

Name of Event: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Time of Event: \_\_\_\_\_ Event Venue: \_\_\_\_\_

Venue Address/City/State/Zip: \_\_\_\_\_

Description of Event: \_\_\_\_\_

\_\_\_\_\_

How will funding be raised? \_\_\_\_\_

Other organizations involved with the event: \_\_\_\_\_

How will the funds be used?

➔ Specify purpose of funding (other than Annual Fund):

\_\_\_\_\_

Department (circle one):

Creative Writing | Dance | Instrumental Music | Media | Piano

Theatre Arts | Theatre Design & Technology | Visual Arts | Vocal | Academic class: \_\_\_\_\_

## MARKETING

Will you be requesting permission to use our Asawa SOTA or FoSOTA logo/name on marketing materials?

The **Asawa SOTA** logo or name will be used

The **FoSOTA** logo or name will be used

If you answered yes to the question above, please explain how the logo(s) will be used: \_\_\_\_\_

\_\_\_\_\_

We will gladly provide the official logo(s) and style guide directly to your designer.

Designers Name: \_\_\_\_\_ Email: \_\_\_\_\_

**REQUESTED MATERIALS**

Will you need any of the following materials?

- General Asawa SOTA brochures
- Upcoming event postcards
- Other: \_\_\_\_\_

*“Other” material requests will be approved on a case-by-case basis*

**ADDITIONAL EVENT INFORMATION**

Please provide a detailed description of your fundraising event: \_\_\_\_\_

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**PROJECTED EXPENSE & INCOME**

Provide the estimated income and expenses below. Add an additional page if more space is needed. You may also attach your event budget, if you have one.

<b>Expenses Items</b> <i>(venue rental, food &amp; beverage, marketing, etc.)</i>	<b>Estimated Expense</b>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

<b>Source of Income</b> <i>(ticket sales, spoors, product sales, etc.)</i>	<b>Estimated Amount</b>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**Total Estimated Expenses** \$ \_\_\_\_\_

**Total Estimated Net Income** \$ \_\_\_\_\_

**PAYMENT COLLECTION METHOD** (check all that apply)

- Checks made payable to FoSOTA will be mailed directly to FoSOTA by individual donors.
- Checks and/or cash will be collected by (name) \_\_\_\_\_ and presented to FoSOTA by (date) \_\_\_\_\_.
- The event coordinator will be responsible, financially and otherwise, for operating this event and in no manner will FoSOTA be liable for any claims or liabilities, no matter by whom made, in connection with this event;
  - All monies collected on behalf of FoSOTA must be presented to FoSOTA within 10 days after the event, unless otherwise cleared by an authorized officer of FoSOTA; and
  - All publicity (fliers, posters, brochures, etc.) for the event using the FoSOTA name or logo must be approved by FoSOTA before release.

*Your signature confirms receipt of, and agreement to, our Policy and Procedures for external fundraisers (page 3). Any questions should be directed to the FoSOTA team prior to signing this agreement.*

**Fundraising Group Coordinator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**THANK YOU FOR SUPPORTING THE RUTH ASAWA SAN FRANCISCO SCHOOL OF THE ARTS!**

## EXTERNAL FUNDRAISING EVENTS POLICY & PROCEDURES

### FUNDRAISING EVENTS

This policy statement has been developed as a guide to donor fundraising, including fundraising events and solicitations. In this document, those persons running the event will be referred to as the Fundraising Group.

When fundraising group conducts fundraising activities and solicitations on behalf of the Ruth Asawa San Francisco School of the Arts (Asawa SOTA), for tax purposes, such fundraisers are being done on behalf of FoSOTA. It is important that these activities be conducted under the observation and fiscal guidance of FoSOTA to ensure that Donors are entitled to the appropriate tax deductions, to protect SOTA and FoSOTA from unintended tax consequences to themselves, and to determine that FoSOTA is not exposed to penalties for failing to make required solicitation disclosures.

### External Events

Before undertaking fundraising events, all fundraising groups will describe their event or other effort to raise money using FoSOTA's 501(c)3 status by submitting a Fundraising Proposal Form. Otherwise, the event is not considered a charitable event and FoSOTA is under no obligation to acknowledge any receipts from the event as a tax-deductible contribution.

The fundraising group's event collateral (fliers, ads, etc.) should make clear exactly what program(s) and department the money is being raised for. Marketing material containing the Asawa SOTA and/or FoSOTA logos or name should be sent to FoSOTA for review, prior to distribution, to preserve the quality and consistency of the Brands.

External events marketed as "fundraisers" for SOTA/FoSOTA must agree to donate at least 75% of the proceeds to benefit Asawa SOTA/FoSOTA. The department director and executive director, in consultation with the school principal, shall make decisions on the approval of fundraisers on a case-by-case basis.

### Responsibilities of the External Fundraising Group *(Events held by anyone other than FoSOTA)*

The fundraising group will retain responsibility for their fundraising event and matters related to it including:

- i. the management, coordination, implementation and follow-up of their fundraising event.
- ii. ensuring that costs of an external fundraising event does not exceed 25% of the proceeds.
- iii. compliance with laws.
- iv. submitting all marketing material containing the Asawa SOTA and/or FoSOTA logos/names for approval, prior to distribution.
- v. delivering all proceeds to FoSOTA within ten (10) days following the event date.
- vi. reporting and other requirements of every kind such as licensing, tax payment, and the cost of the liability insurance, when necessary.

### Tax Requirements and Acknowledgements

Donors who contribute \$250 or more will need a written acknowledgement from FoSOTA in order to claim a tax deduction for the contribution. FoSOTA will provide the appropriate acknowledgement to the donors, but will require certain detailed information in order to do so. Specifically, the fundraising group will need to provide the following information, in an Excel document:

- i. The donor's first name, last name, address, city, state, zip;
- ii. The date and amount of the contribution;
- iii. A detailed description of any goods and services provided in exchange for the contribution.

### Additional Information on Tax Deductions

- i. Contribution of services, while appreciated, are not generally deductible.
- ii. Raffle tickets are not tax-deductible. This should be stated clearly on the face of distributed tickets.
- iii. Sales (Art, etc.) purchases are not tax-deductible.
- iv. Auctions – items for auction should be reviewed on a case-by-case basis to determine tax deductibility of item. *Note: When a donor places the winning bid on an auction item, the donor receives a benefit equal to the fair market value of the item purchased with the bid. For there to be a charitable contribution element to that purchase, the donor must have knowingly bid an amount that exceeds the fair market value of the item. Only the amount equal to the difference between the winning bid (consciously made in excess of the fair market value) and the fair market value is a charitable contribution for income tax deduction purposes.* Goods or Services - If the fundraising group provides goods or services in exchange for a donation, certain disclosures are required to be made upon solicitation. *For example, if the group is sponsoring a dinner, the donor can only deduct the excess of the ticket price above the fair market value of the dinner. This limitation on the deduction, known as a "quid pro quo disclosure", must be disclosed at the time of solicitation. Disclosure on the ticket of the event is a typical method for making this disclosure.*