Third-Party Fundraising
A Toolkit
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Cornerstone Montgomery

About Us

Over 40 million Americans currently live with a mental health diagnosis – that’s one out of every five adults. Millions more suffer from substance abuse problems. Cornerstone Montgomery helps people and families that are living with a mental health and substance use disorder. We work with people in acute crisis and those who have long-term needs. Cornerstone Montgomery’s goal is to keep people out of the hospital and in their communities.

We work with clients and their families to determine the most beneficial type of treatment - at home, in one of our supported housing programs, or in our residential houses. Once a client has completed a course of rehabilitation, Cornerstone Montgomery provides continuing services to integrate clients back into the community. Our services help people find and keep housing, train for new jobs and lead independent lives. Our programs include:

• Residential Rehabilitation
• Supported Living and Community Outreach
• Residential Crisis Services
• Integrated Health and Health Homes
• Vocational
• Assertive Community Treatment
• Case Management and Housing Facilitation
• Outpatient Mental Health Clinics
What is a Third-Party Fundraiser?

Thank you for your interest in supporting Cornerstone Montgomery by hosting a fundraising event. Your generous efforts will help the more than 2,500 individuals in Montgomery County who count on Cornerstone Montgomery every day to help them maintain housing, find and keep employment, and lead independent lives.

A third-party event is a fundraiser which community members organize to raise funds on behalf of a cause or charity. These events are hosted by or paid for by the organizer and the proceeds generated support the mission of the selected charity.

When you are ready to start planning your fundraiser, please complete the Third-party Fundraising Proposal form found on our website!

Fundraising Ideas

**BIRTHDAYS AND CELEBRATIONS**
Ask friends and family to donate to Cornerstone Montgomery instead of giving gifts. Facebook makes it easy to host a Birthday fundraiser!

**WORKPLACE CAMPAIGNS**
Payroll deductions, employee happy hours, casual dress Fridays...ask your employer if they match your donations!

**TOURNAMENTS**
Basketball, golf, volleyball, board games and more! Set up a virtual or live tournament of your choice to raise money for Cornerstone Montgomery.

**STORE SALES OR TICKET PROCEEDS**
Love shopping for a cause? Donate a percentage of store sales or event ticket sales to Cornerstone Montgomery, to make every purchase go even further.
Guidelines for Successful Third-Party Sponsored Fundraising

To ensure that all proposed fundraising events and activities fall within Cornerstone Montgomery guidelines and comply with all regulations pertaining to fundraising for a nonprofit organization, we request that all Third-Party Fundraising Event Proposals be submitted four weeks prior to the scheduled event for review and final approval. Each proposal will be reviewed for compatibility and alignment with Cornerstone Montgomery’s mission, goals and objectives.

In order to use Cornerstone Montgomery’s branding (name, logos, images, etc.) for the purposes of soliciting prizes, sponsorships, underwriting or cash donations from another organization, group or individual to support or promote the event or activity, prior written permission and approval must first be obtained from Cornerstone Montgomery.

The third-party responsible for the event intended to benefit Cornerstone Montgomery must agree to indemnify and hold Cornerstone Montgomery blameless for any and all risk and claims that may arise as a result of the event. Cornerstone Montgomery is not responsible for any liabilities, liability insurances, losses, debts or expenses arising from the event or event promotions.

Cornerstone Montgomery assures the privacy of those we serve. No current or former clients of Cornerstone Montgomery may be contacted in connection with the fundraising event or activity.

Cornerstone Montgomery will not purchase advertising to promote third-party fundraising events or activities. Cornerstone Montgomery will advertise the event via its social media platforms one (1) time, possibly more, if time and scheduling allows.

Cornerstone Montgomery cannot guarantee attendance or media coverage for third-party fundraising events or activities. Any contact with the media must be coordinated with Cornerstone Montgomery.
Guidelines for Successful Third-Party Sponsored Fundraising (ctd)

Cornerstone Montgomery will not solicit for prizes or money for third-party events or activities.

Cornerstone Montgomery cannot serve as the fiscal agent for third-party events or activities.

Third-party fundraising event or activity sponsors and their volunteers must comply with all federal, state, and county laws and regulations, as well as local municipality ordinances including but not limited to registering with the appropriate agencies, purchasing insurance, following IRS rules of disclosure, and obtaining required licenses or permits.

When possible, Cornerstone Montgomery employees and/or volunteers will be available to work or appear at third-party events or activities. Requests for Cornerstone Montgomery staff or volunteer assistance at the event should be made as far in advance of the event or activity as possible.

To avoid any duplication of fundraising efforts, third-party fundraising sponsors must coordinate with and request permission from Cornerstone Montgomery before soliciting any individual, organization, foundation or business for financial or other considerations in support of the fundraising event or activity.

Cornerstone Montgomery reserves the right to decline or cancel participation in a third-party fundraising event for any reason at any time.
Donations

While Cornerstone Montgomery is the recipient of donations raised through events, Cornerstone Montgomery is not hosting the events. Only donations (corporate or individual) made payable to Cornerstone Montgomery will receive a tax-deductible receipt.

Gifts-in-kind (goods and services given instead of giving money) received to support third-party fundraising events are not eligible to receive tax-deductible receipts from the Cornerstone Montgomery. By law, Cornerstone Montgomery cannot provide a donor with a tax-deductible receipt for in-kind gifts donated to groups hosting events on Cornerstone Montgomery’s behalf.

Regulations governing raffles and auctions differ from state to state. Please check with your State Attorney General’s office for your state regulations.

Event Expenses

The individual or group organizing the third party event is solely responsible for all expenses incurred for conducting the fundraiser. Cornerstone Montgomery will not be liable for any expenses and will not reimburse the organizer for the purchase of any goods or services.

Federal tax laws do not allow third party events to use Cornerstone Montgomery’s tax exemption or Federal Employer Identification number when purchasing any goods or services from vendors.

Event Insurance and Liability

The event planners are responsible for obtaining any necessary permits, licenses, and insurance required for their event.

The event must comply with all relevant state and federal laws. Cornerstone Montgomery is not liable for any injuries sustained by event volunteers or participants related to fundraising events benefiting Cornerstone Montgomery. Cornerstone Montgomery cannot assume any type of liability for fundraising events.
Event Endorsement and Sponsorship

In naming your event or promotion, Cornerstone Montgomery should be listed as a beneficiary of the event. For example, organizers may not refer to the event as the “Cornerstone Montgomery Bowl-a-Thon”; instead, it could be promoted as a “Bowl-a-thon to benefit Cornerstone Montgomery.”

An event organizer may not use the Foundation’s 501(c)(3) tax exempt status when soliciting financial support or gifts- in- kind from a vendor.

Event Promotion

You may include the following statement in promotional materials: Gross Proceeds, Net Proceeds - or % of proceeds (i.e. state specific %) – from this event will benefit Cornerstone Montgomery. If Cornerstone Montgomery is not the sole beneficiary of your event, the percent of funds your organization plans to donate to the Cornerstone Montgomery must be advertised in your promotion.

The official Cornerstone Montgomery logo should be appropriately used in conjunction with your event and may not be altered in any way. Any promotional materials should reflect that Cornerstone Montgomery is the beneficiary of the event and not the host or sponsor.

Advertising and promotion of the fundraising activity is the sole responsibility of the event organizer, and promotional materials cannot be purchased by Cornerstone Montgomery.

Cornerstone Montgomery cannot provide assistance in the solicitation of sponsorships for your event.

Any direct mail solicitations must be reviewed and approved by Cornerstone Montgomery.

Cornerstone Montgomery must review and approve all promotional materials such as letters, brochures, flyers, posters, tickets, and press releases.