



## **Third-Party Fundraiser Package**

Dear Friend of the Travis Roy Foundation:

Thank you for considering the Travis Roy Foundation as a beneficiary of your fundraising activities. We appreciate your efforts to help us. Donations of all sizes have an impact – every penny will help the Travis Roy Foundation do its work.

The Travis Roy Foundation actively encourages third-party fundraising. We ask that, if possible, you submit your fundraising idea to the Foundation for approval at least 60 days in advance of your event. The use of the Foundation's name for any purpose is prohibited unless you have received prior written approval from an authorized representative of the Foundation.

This packet contains the following information:

1. A copy of the Travis Roy Foundation Policies and Procedures for third party fundraising activities.
2. A Third Party Event Proposal Form, to be completed and returned to the Foundation to initiate the approval process.
3. Tips on organizing a successful third party event, including a suggested event expense tracking sheet.

The Travis Roy Foundation is grateful to all those businesses, organizations and individuals who seek to conduct third-party events in support of our mission. Please contact Marge Oppold, Executive Director, 802-373-4835, [moppold@travisroyfoundation.org](mailto:moppold@travisroyfoundation.org), with any questions.



## **Guidelines for Third-party Fundraisers for the Travis Roy Foundation**

1. Any group that wishes to hold a fundraiser using the Travis Roy Foundation name or supporting in whole or in part the Travis Roy Foundation should contact the Foundation Director, Marge Oppold, at [moppold@travisroyfoundation.com](mailto:moppold@travisroyfoundation.com) to receive written permission to sponsor a fundraiser. It is recommended that requests for permission be submitted at least sixty days before the event. The Foundation will consider permission requests for events in less than sixty days on a case by case basis.
2. The Foundation shall always have full right, title and control over the use of its name and logo. Any use by a third party is authorized only upon receipt of express written permission by an authorized representative of the Foundation which can be revoked at any time at the discretion of the Foundation.
3. No event shall imply that the fundraiser will benefit Travis personally (Travis receives no compensation for his work with the Travis Roy Foundation).
4. Although the Foundation will consider requests for personal appearances/attendance by Travis Roy, event organizers should understand that his schedule may not permit attendance at events.
5. After receiving written permission for the fundraiser from the Foundation, all printed materials and other public information relating to the fundraiser should state, "Proceeds will benefit the Travis Roy Foundation." If the event will not solely benefit the Travis Roy Foundation, all printed materials and public information please state clearly the percentage of the proceeds that will benefit the Travis Roy Foundation on all advertising, promotional and print materials.
6. All printed and electronic material relating to the event, including press releases, which mention Travis Roy or the Travis Roy Foundation and/or use the Travis Roy Foundation name, logo or marks shall require prior written approval from a designated representative of the Travis Roy Foundation. Any planned television or radio broadcasts which mention Travis Roy or the Travis Roy Foundation and/or use the Travis Roy Foundation name, logo or marks shall also require prior written approval from the Travis Roy Foundation. All intellectual property arising from any Travis Roy Foundation event shall be the property of the Travis Roy Foundation.
7. The sponsor of any event shall insure that the Director of the Travis Roy Foundation receives copies of any press generated by the event. From time to time, the Travis Roy Foundation may assist with media coverage, but this will be arranged by agreement between the Travis Roy Foundation and the event sponsor at the time of the event.
8. The Travis Roy Foundation must review a list of all targeted sponsors (including all potential in-kind donors) prior to every event. This will allow the Travis Roy Foundation to provide event sponsors with information about past or current support for the Travis Roy Foundation. Event sponsors agree to help the Travis Roy Foundation safeguard existing relationships and preserve the integrity of the Travis Roy Foundation name.

9. Events and materials publicizing any events must be conducted in compliance with federal, state and local law. Even sponsors will provide the Travis Roy Foundation with evidence that they are in compliance with all federal, state and local legal and registration requirements relating to the event. The Travis Roy Foundation will cooperate with event sponsors to the extent necessary to obtain such approvals, but the event sponsors bear sole responsibility for obtaining the necessary legal approvals.
10. Event sponsors must plan for covering the expenses of the event, including any necessary insurance and filing fees. The Travis Roy Foundation cannot provide funds in advance or retroactively to cover event expenses. Third party sponsors may not cash checks payable to the Foundation to cover expenses. To the extent an expense is paid directly by a donor or third party organizer, please forward that information to the Foundation so it may be documented for tax purposes.
11. Sponsors must also plan for the best and safest means for forwarding tax deductible contributions to the Foundation so that they may be accounted for and acknowledged to the donors. All donors who make contributions payable to the Travis Roy Foundation will receive a written acknowledgement consistent with requirements of state and federal law from the Travis Roy Foundation. These contributions will be added to the sponsor's event donation total, but cannot be applied to pay for event expenses. Event sponsors are responsible for forwarding to the Travis Roy Foundation the names and addresses of donors who have contributed to the Travis Roy Foundation in connection with the event. The Travis Roy Foundation is the only party authorized to send out receipts and acknowledgments for donor contributions to third party events. It is imperative that the event sponsors keep careful records of all donors. It is highly recommended that the organizers prepare spreadsheets with each donor's name and address and the amount of the contribution. (See attachment "A") Event sponsors must submit an accounting of funds raised and proceeds generated within thirty days of the conclusion of the event.
12. Massachusetts law requires filing by all commercial co-venturers, professional fundraising counsel and professional solicitors. If you anticipate anyone involved in your event is subject to such requirements, you must inform the Foundation immediately as to his, her or its name and financial arrangements. You warrant that all third parties involved in connection with your event have complied with all state and federal filing requirements, and have all revenue approvals, in connection with the event.

## Overview

The event sponsor is solely responsible for the development and execution of the Third-Party event.

### What the Travis Roy Foundation can do for you

- Offer limited event planning expertise and advice.
- Acknowledge direct contributions to the Travis Roy Foundation with a personalized thank you letter.
- Approve the use of the Travis Roy Foundation name and/or logo.
- Provide individualized online fundraising pages for teams, individuals, and groups.
- Provide limited quantities of existing TRF materials such as brochures and videos to distribute at your event.
- Assist with securing appropriate insurance for an event.

### The Travis Roy Foundation generally cannot

- Provide staff or volunteer support.
- Provide funding or reimbursement for expenses.
- Provide donor or vendor mailing lists.
- Solicit auction items.
- Provide the Foundation's tax exempt number for purchasing supplies.
- Guarantee event attendance by Travis Roy.
- Guarantee corporate sponsorship.

### Things to Remember

- Complete and return the Third Party Agreement at your earliest convenience and within such time prior to the event such that the Foundation has a reasonable time to review and approve it.
- Establish goals that are realistic and measurable.
- Identify your audience.
- Plan a budget. Identify sources of income and all expenses. If you keep costs down, you'll generate a larger donation – something everyone will feel good about. The Travis Roy Foundation generally expects expenses not to exceed 20-25% of the total funds raised.
- Make sure that you are properly insured for the event. In most cases, insurance is inexpensive but well worth the cost.
- Promotion and publicity – You need to be certain that all promotional and publicity materials are approved by the TRF to ensure that you are using the name, logo, and charitable language correctly.
- Establish a safe bank or other deposit account to hold funds for the event. Determine who is to have access to the account.
- Collect the funds and submit the proceeds. We ask that all funds be forwarded to the TRF within 30 days of the conclusion of the event.
- **Until written permission is received, the name “Travis Roy Foundation” cannot be used for any purpose and contributions cannot be solicited.**

Thank you again for your interest in planning an event to benefit the Travis Roy Foundation. Philanthropic contributions such as yours help us.



## THIRD PARTY EVENT APPLICATION

We ask that you fill out the following form as completely as possible.

Name of Sponsoring Group : \_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

(Please list additional volunteers/committee members and their full contact information on a separate sheet)

Primary Contact's Address (if different from above): \_\_\_\_\_

\_\_\_\_\_

Phone (day): \_\_\_\_\_ E-mail: \_\_\_\_\_

Please give a brief description of the event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date and time of event: \_\_\_\_\_

Location of event: \_\_\_\_\_

\_\_\_\_\_

Please describe how the event will be publicized: \_\_\_\_\_

\_\_\_\_\_

Estimated Number Attendees/Participants: \_\_\_\_\_

How will the money be raised (pledges, contribution, donations, etc): \_\_\_\_\_

---

---

How will funds be will be solicited, collected and held prior to disbursement to the Foundation:

---

Please list who will be responsible for the collection, safeguarding and disbursement of all funds raised. Identify by name, address, occupation/professional affiliation, phone numbers and email addresses

---

List all targeted sponsor(s) of this event:

---

---

Please describe what assistance, if any, you are requesting from Travis Roy Foundation:

---

How much of your estimated net proceeds will be contributed to the Travis Roy Foundation:

---

**I HEREBY AGREE THAT THE FOREGOING STATEMENTS ARE TRUE AND AGREE TO INDEMNIFY AND HOLD HARMLESS THE TRAVIS ROY FOUNDATION AGAINST ANY CLAIM OR INJURY RESULTING FROM THE MISUSE OR MISAPPLICATION OF FUNDS RAISED IN THE FOUNDATION'S NAME PRIOR TO THEIR DISBURSEMENT TO AND RECEIPT BY THE FOUNDATION.**

\_\_\_\_\_  
SIGNATURE

**PLEASE RETURN THIS FORM FOR APPROVAL TO**

MARGE OPPOLD  
EXECUTIVE DIRECTOR  
TRAVIS ROY FOUNDATION  
60 STATE STREET, 8<sup>TH</sup> FLOOR  
BOSTON, MA 02109

**“Attachment A”**

**Sample Event Expense Tracking Spreadsheet**

---

**SPONSORS**

<b>First Name</b>	<b>Last Name</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Phone #</b>	<b>Donation</b>	<b>Expense</b>	<b>Tax Deduct. Amt</b>
Jane	Smith	XYZ Company	1234 Main Street	Boston	MA	02109	617-619-2800	\$5,000.00	\$500.00	\$4,500.00

---

**EVENT REGISTRATION FEES**

<b>First Name</b>	<b>Last Name</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Phone #</b>	<b>Donation</b>	<b>Tax Deduct. Amt</b>
Jane	Smith	XYZ Company	1234 Main Street	Boston	MA	02109	617-619-2800	\$400.00	\$400.00

---

**MONETARY DONATIONS**

<b>First Name</b>	<b>Last Name</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Phone #</b>	<b>Donation</b>	<b>Tax Deduct. Amt</b>
Jane	Smith	XYZ Company	1234 Main Street	Boston	MA	02109	617-619-2800	\$200.00	\$200.00

---

**IN-KIND DONATIONS**

<b>First Name</b>	<b>Last Name</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Phone #</b>	<b>Item Received</b>	<b>Value/Tax Deduct. Amt</b>
Jane	Smith	XYZ Company	1234 Main Street	Boston	MA	02109	617-619-2800	Free Printing	\$300