



## **Third-party Event Guidelines**

The Kellermann Foundation (KF) thanks you for your interest in hosting an independent third-party fundraising event to benefit the Kellermann Foundation. Events such as yours are important to the Foundation's efforts to raise funds and awareness of the work of the Kellermann Foundation as we provide "hope and health" to the displaced Batwa tribe of southwestern Uganda.

An "event" can be described as any effort by an interested third party (including but not limited to board and staff members of KF) to raise funds in one of the following manners:

- a. Plan a trip to Uganda to visit the programs associated with KF with the intention of raising support from participants, but independent of KF annual visits
- b. Sell items purchased in Uganda as retail merchandise using KF branding
- c. Host an occasion (i.e., marathon, golf tournament)
- d. Or any function event using KF branding

### **1. General Provisions**

- a. All events must be approved by KF well in advance.
- b. Events must support the mission, image, and core values of KF.
- c. Organizers are entirely responsible for the event, including operations/logistics, promotion, legal liability, financial liability, conducting the event safely, and benefiting each party's public image.
- d. KF must be listed as an additional insured party on any insurance plans covering the event, if appropriate and possible.
- e. All necessary permits must be obtained by the organizer.
- f. Participant waivers, if appropriate, must be obtained by the organizer.
- g. KF may not be relied upon to provide personnel, minimum ticket sales, nor to help administer the event, unless explicitly agreed upon.

### **2. Materials**

- a. Event marketing materials must clearly disclose:
  - i. The specific percentage or calculation used to determine amounts being donated to KF.
  - ii. That the event is not produced, supervised, or sponsored by KF.
- b. Written authorization must be obtained to use KF's logo and other promotional materials.
- c. All promotional materials (invitations, merchandise, press releases, etc.) must be approved by KF prior to their production and distribution.

### **3. Finances and Taxes**

- a. KF will not allow use of its tax ID number for the event and will not accept or acknowledge for tax purposes individual donations for the event.
- b. Participants should make their checks payable to the event organizer, who may not offer the option of writing checks to KF.
- c. KF will only process the final net proceeds of the event and will not, under any circumstances, allow third-party event revenues and expenses to flow through KF.
- d. The final net proceeds must be submitted as one check payable to KF within 30 days of the event, along with a detailed accounting of the event's revenues and expenses.
- e. KF's sales tax exemption on purchases cannot be extended to any third-party event organizer.
- f. The organizer may not establish a bank account in KF's name.

The following fundraising activities are prohibited in conjunction with third-party events for the benefit of the Kellermann Foundation:

- a. Programs that raise money on commission;
- b. Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity; and
- c. Direct solicitation (including but not limited to door-to-door canvassing, telemarketing, or internet).

The Kellermann Foundation may direct you, and you agree to comply with the direction, to cancel your event and withdraw any and all use of the Kellermann Foundation's name in association with your event. Such direction may occur for any reason, including the Kellermann Foundation's belief that an association with your event or any consequences that contribute to or result from your event may have a negative effect on the mission, credibility, or reputation of the Kellermann Foundation.

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In agreement with the Guidelines for Third Party Events, and its agreement to indemnify and hold harmless the Kellermann Foundation against claims by third parties, vendors, participants, organizers, and invitees, please sign and date below.

Signed:

\_\_\_\_\_  
Third-party Event Planner

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Kellermann Foundation Official & Title

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date