

# Third Party Fundraising Tool Kit

EVERY IDEA.
EVERY DOLLAR.
EVERY DOLLAR.
DROP
COUNTS.

# Table of Contents

Introduction	1
About WPBDF	2
What is DIY?	3-4
Fundraising Ideas	5-6
DIY Planning Checklist	7-9
What is Unite Your Way?	10-11
DIY Event Policies	12-14
Resources	15-20



Thank you so much for your interest in supporting the Western Pennsylvania Bleeding Disorders Foundation (WPBDF). We believe that great things are possible when people come together. By deciding to hold your own DIY Fundraiser, you are making a difference in ensuring the Chapter can provide patient assistance, education, and advocacy to the Western PA Bleeding Disorders community.

In this tool kit, you will learn about WPBDF, how you can help by turning your passions into unique fundraisers, and how you can count on us to support you in your efforts. Every Idea, Every Dollar, Every Drop Counts. Your support will allow us to continue to provide diverse educational programs at no cost to our members, emergency medical and patient assistance to those in need, advocacy training to empower our community, and an entertaining and educational experience for our campers at Camp Hot-To-Clot. Once you have submitted your DIY Fundraising idea to WPBDF, you can expect to hear from us within 5-7 business days.

Our vision is to make the world a better place for those with Bleeding Disorders. Thank you for being a part of that vision.







### Who We Are

The Western Pennsylvania Bleeding Disorders Foundation (WPBDF) is a nonprofit consumer advocacy and service organization founded in the 1950's and incorporated as a 501(c)(3) nonprofit organization in 1976. We were founded to help meet the vast education and support needs of the bleeding disorders community in Western Pennsylvania.

### What We Do

WPBDF strives to enrich the lives of those with bleeding disorders in Western Pennsylvania and respond to the needs of the community in a dynamic environment.

WPBDF serves families with bleeding disorders in 26 counties of Western Pennsylvania. Membership is free for people with bleeding disorders. We provide patient assistance to our members with bleeding disorders as well as hold a variety of educational events that cover a wide range of topics. Because bleeding disorders impact nearly every area of our members lives, we strive to provide relevant and timely information about everything from raising affected children to dealing with financial stress to joint health and treatment concerns and much more.

In addition to large, chapter-wide events, we have several small support groups that meet throughout the year such as the men's group, women's group, teen group, and a New Parent Network program that specifically addresses concerns of parents of children under the age of 8.



### What is a DIY Fundraiser?

A DIY Fundraiser, or Third Party Fundraiser, is an event, activity, or initiative that is organized and hosted by an independent individual, organization, or business not officially or directly involved with day-to-day operation of the chapter. These events are not official WPBDF calendar events, but benefit the chapter, our members, and our mission. Acting independently, and with WPBDF's approval, DIY Fundraisers are an important resource for raising funds and increasing awareness of the organization and the bleeding disorders community.

### What do we do with your support?

Bleeding disorders can cause severe physical, emotional, and financial hardships for affected families. We provide our members with specialized educational programs about all aspects of living with bleeding disorders, a medically safe summer camp experience for affected children who may not be able to attend a non-specialized camp due to the complexities of treating their disorder, free medical IDs to help ensure timely and appropriate treatment in the case of an emergency, direct patient assistance with medically related expenses in cases of financial hardship, and much more. We are proud we can continue to provide this support to families affected by bleeding disorders at no cost to them.



### How do we support you?

We will coach you through the creation, development, and execution of your event. You are passionate about your fundraiser and believe in the mission you are supporting – **And we believe in you too!** 

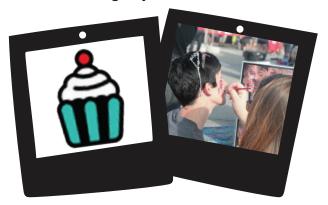
Depending on your idea, here are some ways we can help:

- X <u>Planning</u>: You will have access to a WPBDF Coach who will be able to answer your questions and provide fundraising and planning support. Your coach will help you refine your idea to ensure it aligns with our values and our community.
- X <u>Implementation</u>: We can provide letter templates to help gather donations or sponsors, an online fundraising tool (Unite Your Way) to help collect your donations, and offer advice/planning templates to budget out your event!
- X Promotion: Your coach will provide you with a Proudly Supporting WPBDF logo to be used on all of your promotional materials. We can also provide you with bleeding disorder fact sheets, chapter statistics, and chapter brochures to share who WPBDF is while you show them why our mission is important to you! WPBDF will share an approved flyer or post on our social media page leading up to your event. Please provide any photos, copy, or flyer to be posted along with what day you would like the event to be shared. Send materials to WPBDF's Development Director, Jessica, at jessica@wpbdf.org.
- X <u>Post-Event</u>: You will be responsible for thanking your supporters and submitting donations to WPBDF (made easy using Unite Your Way). We are here to help you with any questions you may have about this process.



# **Fundraising Ideas**

DIY Fundraising is a chance to use your creativity to support the bleeding disorders community. Here are a few ideas to get you started:



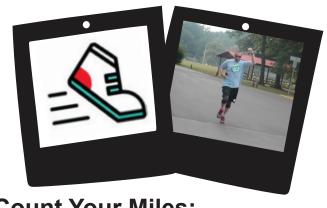
### **Make Your Hobby Count:**

- X Take me out to the ballgame. What's your favorite sport? Pick a sunny day and host a tournament for your family and friends.
- ✗ Dance like no one's watching. Gather your friends and family and see who can dance the longest. Prizes for the best costume and cutest couple!
- Came Night! Trivia, board games, whatever your style when you and your friends raise money to support the bleeding disorders community, everyone wins!



### **Make Your Celebration Count:**

- **X Donate Your Birthday.** Ask everyone to make a donation equal to your age. If you are turning 30, ask for donations in \$30 increments.
- X Party like it's 1999. Relive the tunes from your favorite decade by having a themed party. Don't forget to make a self-donation when you register to showcase your commitment to our cause.....and tell party-goers to dress in their '60s, '70s, '80s or '90s finest!



### **Count Your Miles:**

- **X Exercise Your Way.** Host or join a run, walk, bike ride, or endurance event. Already participating in an existing event? You can still fundraise through UNITE Your Way to track donations.
- X Fitness for a Cause. Work with a local gym or fitness studio to organize a Zumba, kickboxing, yoga or spin marathon. Attendees can register on line and make a contribution to cover their entry AND invite their friends and family to sign up for or donate to their fundraising efforts.

Talk to your coach about the fundraisers you've seen other chapter members or walk team captains do in the past and get feedback on how they worked and what the outcomes were. Some examples of awesome and successful fundraisers our walk team captains completed are:

- ✓ Steelers Prize Pack Raffle
- ✓ Buffalo Wild Wings Eat Wings, Raise Funds
- ✓ Get Crafty Events



# **Planning Checklist**

You've got the idea. We're here to support you! Hosting a DIY Fundraiser should be an inspiring experience and we have compiled a checklist to help you get started. After you have reviewed this list and filled out your DIY Fundraiser Information Sheet, a WPBDF Coach will get in touch with you to kick start the planning process.

Remember: Every Idea. Every Dollar. Every Drop Counts.



### Step 1 — Check Out Our Resources

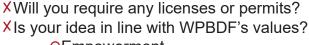
You can find examples of these resources on page 15 of this tool kit. You can find editable versions of these materials on wpbdf.org or email Jessica at jessica@wpbdf.org.

- ★ DIY-dea Information Sheet: Use this form to solidify your idea and apply to host your event!
- ★ In-Kind Donation Letter: Use this form to collect donations or sponsors for your event.
- X Event Expense Planning Sheet: Use this form to keep track of your revenue and expenses.
- **X** Donation Tracker: Use this sheet to keep track of everyone who donated to your event. Collect their name, email, and address to make sending thank-you notes easier!

### Step 2 — Develop a Plan

- XWhat type of fundraiser are you planning on holding?
- XWhere can you host your event? (online or in person?)
- XWhat is your fundraising goal?
- X How will you raise money?
- XHow will you promote your event/fundraising?

Will you have a team working on this with you (friends, family, co-workers)?





OSupport

OEducation

OAdvocacy/Awareness



### 

- X Complete and submit your *DIY*-dea Information Sheet to Jessica Lee, Development Director, jessica@wpbdf.org.
  - OWe will contact you within 5 7 business days following your submission
- XOr mail your form (along with your phone number) to:

Western PA Bleeding Disorders Foundation ATTN: Jessica Lee 775 Fourth Street, First Floor Beaver PA 15009

 We will follow up with a phone call within 5 - 7 business days after we receive your form.

### Step 4 — Set Your Fundraising Goal

- X Setting a goal is very important as it will give you direction and encourage your donors to help you reach it. Every idea. Every dollar. Every drop counts so aim high!
- X With that being said, set your goal realistically. If you've participated in our annual Unite for Bleeding Disorders Walk, think about the goals you set for yourself or your team and what donors you can count on.

### Step 5 ─ Plan for Expenses

- X Make a list of supplies, rentals, and items you will need for your event and what the associated costs will be.
- X Use WPBDF's in-kind donation letter to solicit donation items for raffles, door prizes, or food.

Discuss your expense expectations with your coach and use our Event Expense Planning X Sheet as a guide.

### 

- X <u>Online:</u> You can set up your own page to raise money for WPBDF with Unite Your Way! For anyone who has collected donations using our Unite for Bleeding Disorders Walk pages, the format is very similar and will make tracking and turning in donations a breeze. Your coach will assist you in setting this page up. Online fundraising can increase your success and make it easier for guests and participants to donate to you cause.
- X <u>In-person</u>: Have a donation box at your event for people to drop loose change or bills into! Also be sure to use our Donation Tracker to keep track of any cash or check donations that come your way. WPBDF needs specific donor information to issue tax receipts to eligible donors and any donation of \$20 or more.

### 

- X We want to hear about your success and stories from your event! Be sure to share any photos or stories with your coach throughout your planning process. Planning a fundraiser may be stressful at times, but your coach is there to laugh along with you!
- X Jump on to social media! Facebook, Instagram, Twitter, and YouTube are great places to promote and celebrate the success of your fundraising! By posting your accomplishment, you might motivate others to join in on the fun! Be sure to tag WPBDF in your posts too!



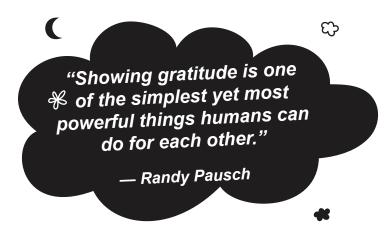


@WPABDF



@WPBDF

### 



X Be sure to thank all participants, donors, and sponsors as soon as possible. This is a great opportunity to update them on your overall fundraising success and remind them how their support will help the bleeding disorders community. If someone went above and beyond in their support, let your coach know so we can thank them too.

### 

- X The final step is to submit the funds you raised to WPBDF so we can continue to provide our programs and support for our chapter members.
  - O Use your Donation Tracker Form to communicate with your coach about tax receipting needs for in-person donors.
  - Proceeds must be submitted within 60 days of the completion of your event. Please note that receipts are issued for the year WPBDF receives the donation in.
  - Your Donation Tracker, along with cash and checks, can be dropped off at the Chapter office. The office is located at:

### 775 Fourth Street, First Floor Beaver PA 15009

Make sure all checks are payable to *Western PA Bleeding Disorders Foundation* or *WPBDF*. Checks made out to you or your event cannot be accepted. All cash should be dropped off, in-person at the Foundation Office.

### What is Unite Your Way?

Every Idea. Every Dollar. Every Drop Counts.
UNITE Your Way lets you turn your passion into a fundraiser – however, wherever, whenever you want. With an online platform dedicated to the fundraiser you choose, and many resources to empower you, you can create your own personal or group fundraiser in the matter of minutes.

### Getting started is easy.

<u>Start Your Fundraiser</u>: You'll have all the tools you need to create and manage your own fundraiser from start to finish.

<u>UNITE Your Family and Friends:</u> Invite your friends, coworkers, and family to support your fundraising.

<u>Celebrate Your Impact:</u> Know that your efforts will help bring research,treatments, education and support for everyone affected by bleeding disorders.

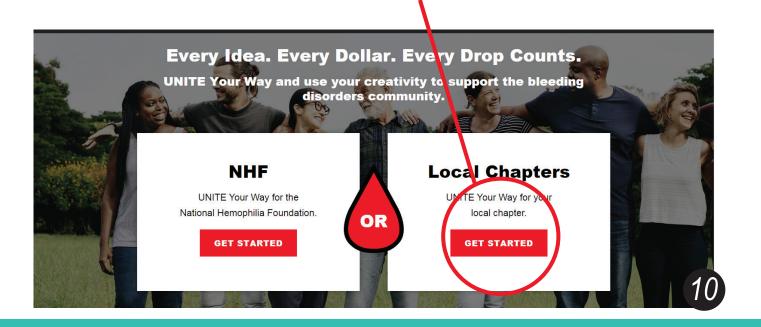
With every idea, every dollar we raise, we'll get closer to ending bleeding disorders.



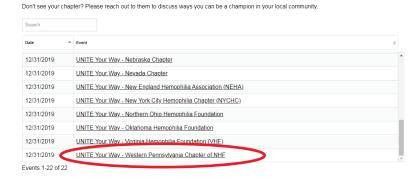
**YOUR WAY** 

### **Getting Started:**

Visit <u>uniteyourway.org</u> and click on "Get Started" under Local Chapters.



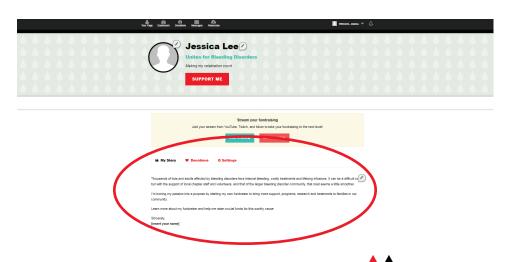
### **Participating local chapters:**



You will be redirected to a list of all the Chapters participating in the Unite Your Way program. Scroll until you find "Western Pennsylvania Chapter of NHF!"



Click on "Register/Create a Page." Once you create your login (which will be separate from your Unite for Bleeding Disorders Login) you will be given step-by-step instructions to set up your fundraising page.



Customize your fundraising page and tell the world why you are hosting your event. Share your story and what WPBDF means to you. Be sure to direct your supporters to your page by sharing your link on your social media and your event page!

When people donate to your Unite Your Way page, receipts will automatically be issued. You can also send them a virtual thank you note! Unite Your Way is directly linked to WPBDF, so turning in your funds post-event is easy. You can also keep track of your donations and your coach will have back-end access to edit your page, check in on your progress, and add cash or checks to your total!

### WPBDF Third-Party Fundraising Event (DIY) Policies

In order to enhance the success of third party fundraising events and to avoid conflicts with WPBDF's donors, corporate sponsors, or other events already planned, the following policies should be observed:

### **Use of Name and Logo**

- 1. Events should complement the mission, values and image of WPBDF. Companies that conflict with the mission, values and image of WPBDF may not be sponsors. We discourage sponsorship by tobacco and firearms companies as well as any other company who, in our sole discretion, may not be a good fit for WPBDF.
- 2. Your organization cannot state or imply that it is an agent, subsidiary, or partner of WPBDF or that it holds any other business relationship with WPBDF.
- 3. Publicity for your event may not imply that the event is sponsored or co-sponsored by WPBDF or that we are involved as anything but the beneficiary. For example, you may not call an event "The Western PA Bleeding Disorders Foundation's Bowl-a-Thon." Your event should be promoted as the "Bowl-a-Thon to benefit The Western PA Bleeding Disorders Foundation."
- 4. You may not use the WPBDF name or logo or otherwise indicate to the public that an



event is being held for the benefit of WPBDF without the prior written consent of an authorized representative of this organization. You may not make public announcements or promote any such event until you receive approval from the organization of your Fundraiser Application.



- 5. You may only use the official "Proudly Supporting WPBDF" logo provided by WPBDF. It must not be altered in any way. When promoting your event on social media or print, the Foundation must be referred to as Western PA Bleeding Disorders Foundation, Western Pennsylvania Bleeding Disorders Foundation, or WPBDF.
- 6. WPBDF reserves the right to review and approve in writing all promotional materials including, but not limited to, advertising, letters, brochures, flyers, and press releases prior to production or distribution.

Proposed materials should be submitted via email to jessica@wpbdf.org.



You will also have access to an all white version of the logo!

### **Event Approval**

- 7. Applications must be completed and submitted to WPBDF no less than 90 days prior to your proposed fundraising event. Approval for the event is subject to change based upon WPBDF's calendar or events. Your event must not conflict with an already scheduled chapter event. If you would like to repeat the event, you must submit a new application.
- 8. WPBDF must be notified in writing if there are any significant changes to the event once it has been approved. If circumstances warrant, WPBDF may at any time direct you to cancel the event or remove any references to WPBDF from the event. If so directed, you agree to release WPBDF and its board members, directors, and employees from any and all liability in connection with any such action.
- 9. We have made a commitment to our members and donors that we do not sell or provide others with our donor and member mailing lists.

### **Financial and Legal Information**

- 10. You should limit expenses to 50% of the total raised by the event. If event expenses are greater than the money raised, you are responsible for paying those expenses. WPBDF will not provide funding or reimbursement of any expenses related to your event.
- 11. You may not keep any portion of the proceeds as profit or compensation for organizing the event.
- 12. Proceeds should be sent to WPBDF no later than 60 days following the event and should be mailed to WPBDF or dropped off at the Foundation's office.
- 13. You must provide WPBDF with a complete accounting of all funds collected and expenses related to the event within three weeks following the event. Because of our responsibility as the recipient of community assets, we reserve the right to inspect all event financial records at any reasonable time with reasonable notice.

- 14. WPBDF may receive funds from other, similar events, fundraisers, and promotions. Our acceptance of your application creates no exclusive rights for you.
- 15. WPBDF will not take out liquor licenses for third-party events.
- 16. You agree that you will comply with all state and/or municipal charitable solicitations, statutes, and/or ordinances which may apply to your event. You also agree to carry out your event so as to not do or allow any of the prohibited acts and practices described in Pennsylvania Charitable Solicitation Act [see http://www.dos.state.pa.us, click on "Charities"].
- 17. Events must comply with all applicable federal, state, and local laws, including all laws governing charitable fundraising and gift reporting. All tax-receipting issues must be agreed upon and documented before WPBDF approval is given. WPBDF may only issue tax receipts for checks made out to "WPBDF" (or approved variations of our name). WPBDF will issue tax receipts for in-kind donations or event sponsorship agreements if you provide complete information for all applicable donors.
- 18. You agree that you will not use WPBDF's tax exemption in any manner or as part of the promotion of your event, nor will you represent to the public that you enjoy any tax-exempt rights or privileges as a result of your role in the event (unless you have separate tax-exempt status), nor will you state that any portion of the purchase price for any goods or services at the event is tax deductible for charitable purposes.
- 19. You agree to indemnify and hold WPBDF and its employees, agents and representatives harmless from and against any and all claims, demands, liabilities, expenses, losses, damages, attorneys' fees arising from or in connection with the event.
- 20.WPBDF will not assume any legal or financial liability associated with your event, nor will we indemnify you or any party involved in your event for any damage, expense, or other costs arising or in any manner related to your event. WPBDF and all related entities are not liable for any injuries sustained by event volunteers or participants related to your event and cannot assume any type of liability.

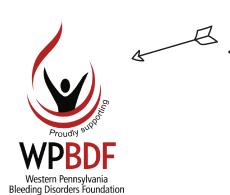
By signing below I acknowledge that I have fully read and understand the Western Pennsylvania Bleeding Disorders Foundation's Third Party Fundraising Event Policy. I understand that if I have any questions or concerns about this policy, it is my responsibility to discuss this with the Chapter's Executive Director.

Name (Printed):					
,					
Signature:					
Date:					



# **Example Forms and Resources**

The following are examples of the forms and resources you will have access to while organizing your DIY Fundraising event. All forms and resources will be sent to you by your WPBDF coach. Additional copies of these pages can be downloaded and printed at wpcnhf.org. Please take some time to review each resource and reach out to your coach with any questions.



Resource #1
Proudly Supporting WPBDF Logo



- O When presented on a white background, always use the full color logo.
- You will also be given an all white version of our logo. The white logo should always be used on dark imagery or colored backgrounds.



## Resource #2 DIY-dea Fundraising/Event Proposal

This is the form you will submit to WPBDF in order to host your DIY Fundraising event. You can use this form as a guide while thinking about your fundraiser. This is the information your coach will need to approve your event. Don't sweat it if parts of your idea aren't complete - your coach will help you figure it out. Please try to fill the form out as best as you can.

### **DIY-dea Fundraising/Event Proposal**

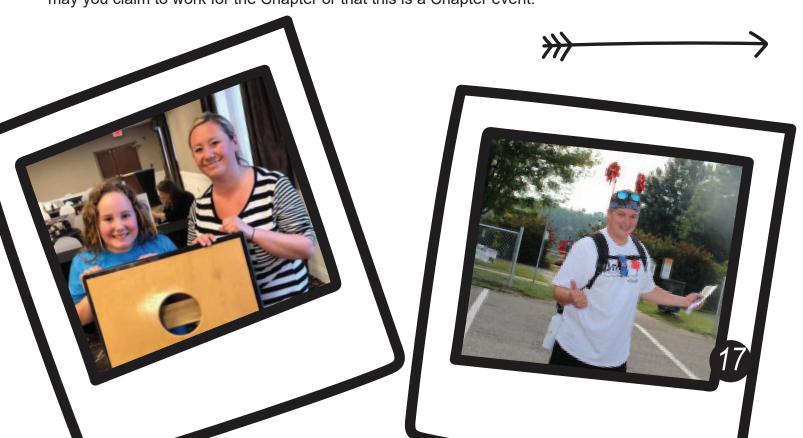
Thank you so much for your interest in supporting the Western PA Bleeding Disorders Foundation. This form will help us learn more about you and your goals so we can better support your efforts. Please fill out this form to the best of your abilities – information can always be updated along the way.

<b>Contact information:</b>						
First Name: Last	Name:					
Organization/Business (if applicable	e):					
Address: S City: S						
City:	State:	Zip (	Code:	·		
Fliolie Nullibel.	(CIIC	ile) Ce	JII	поше	Business	S
Phone on Event Day (if different): _				_		
Email:						
Additional Contacts:						
<del></del>						
<b>Event Information:</b>						
Event/Fundraiser Name:						
Description of event/fundraiser:						
Date(s) event/fundraiser will occur:						
Time(s):						
Location and address:						
Fundraising Information:						
What is your fundraising goal?						
How do you plan on fundraising? (i.	e. portion of	registrat	ion fe	es, online	e fundrais	ing page, raffle
baskets, silent auction, etc.):						
Are you supporting WPBDF for the		Yes	I	No		
How did you hear about WPBDF? _						
Are you supporting more than one of					Yes	No
Will people beyond yourself be fund	Iraising on b	ehalf of t	his ev	vent?	Yes	No

Promotion and Resources:			
Would you like to use the Proudly Supporting the Western PA Bleeding Disorders Foundation logo for			
promotion? Yes No			
How will you promote your event/fundraiser?			
Will you be utilizing Unite Your Way or are you interested in using it? Yes No Will you use any social media tags? Yes No If Yes, what will they be?			
Would you like any promotional materials (such as information about bleeding disorders, chapter			
brochures, etc.) from WPBDF? Yes No TBD			
Would you like to request a WPBDF chapter staff member to be present at your event? (Please note, checking yes will not guarantee a staff member will attend your event. Once your event is approved, please discuss the availability of a chapter staff member with your Coach.)  Yes  No  TBD			
Would you like this person to speak? Yes No TBD What risks or challenges do you foresee with your idea?			

# Resource #3 *In-Kind Donation Request Letter*

This letter can be used to solicit in-kind donations for your event. These can be gift cards and tickets for raffle baskets, door prizes, food, or other products at your event. You can customize the letter to your specific needs, but please remember, no where in this letter or in the advertising of your event may you claim to work for the Chapter or that this is a Chapter event.



### **Example In-Kind Donation Request Letter**

[Date]
[Business Name]
[Address]
[City, State, Zip]

Dear Owner/Manager [Insert name where possible],

I am writing to respectfully request an in-kind donation for [name of fundraiser/event] on [day, date at location] to help raise funds for the Western Pennsylvania Bleeding Disorders Foundation (WPBDF). [Add additional/relevant details about your event and/or ask if you are looking for an auction item or donation.]

The Western Pennsylvania Bleeding Disorders Foundation (WPBDF) serves over 1,500 people in 26 counties of Western PA who are affected by bleeding disorders such as hemophilia and von Willebrand Disease. They are the leading organization in this area dedicated to enriching the lives of those affected through education, advocacy, empowerment and support. WPBDF works to improve diagnosis and support in Western PA.

Bleeding disorders can cause severe physical, emotional, and financial hardships for affected families. Some examples of what we provide our members, in order to alleviate some of these hardships, are:

- Specialized educational programs directed at new parents with a child diagnosed with a bleeding disorder that focuses on all aspects of living with bleeding disorders and provides a network of support.
- A medically safe summer camp experience for affected children who may not be able to attend a non-specialized camp due to the complexities of treating their disorder.
- Free medical IDs to help ensure timely and appropriate treatment in the case of an emergency
- Direct patient assistance with medically related expenses in cases of financial hardship

I would be grateful if you could support our chapter by donating [name of requested item - be specific e.g. food, prizes, products etc]. Your generous donation will help ensure more people have access to WPBDF's educational programs and activities.

Thank you for taking the time to consider this request. If you have any questions, please do not hesitate to contact me via email or phone.

My sincere thanks for your consideration of this request,

[Name] [Event Name] [Contact Information]



# **DIY Fundraising Donation Tracker**

Event/Initiative Name:	act Name:	t Date(s):
Event/Initia	Contact Name:	Event Date(s)

Please print legibly. In order to receive a tax receipt, all contact information must be filled out. Tax receipts

Please arrange to have all forms, cash and checks delivered to the WPBFF Foundation office or to a

are issued upon request to eligible donors for donations of \$20 or more.



775 Fourth Street First Floor Beaver PA 15009

WPBDF will not share contact information. Please make checks payable to The Western Pennsylvania Bleeding Disorders Foundation or WPBDF. Collect donations in advance. All money must accompany form.

Receipt? Y/N		
Cash or Check?		
\$ Amount		
Email		
Phone #		
Address, City, State, Postal Code		
Full Name (and business name if applicable)		
Personal (P) or Business (B)		19

Event/Initiative Name: \_\_\_\_\_

Other

**Total** 

### **Event Expense Tracker**

Contact Name:				
Event Date(s):				
Use this spreadsheet to help keep you organized with spending for your event. You do not need to submit this form to WPBDF. Event costs must be paid directly by the organizer or come out of the event proceeds. These expenses cannot be covered by tax receipt-able donations.				
Expense	\$ Amount	Notes		
Venue/Equipment Rental				
Food and Beverage				
Advertising/Promotion				
Printing (tickets, flyers, etc.)				

20



Western Pennsylvania Bleeding Disorders Foundation

Thank you for hosting a DIY Fundraiser to support the Western Pennsylvania Bleeding Disorders Foundation.

