NEBRASKA COMMUNITY FOUNDATION

FUNDRAISING EVENT CHECKLIST

This checklist is designed to help your affiliated fund through the process of considering, planning and carrying out an event that includes fundraising. It will guide your Fund Advisory Committee through the steps to take to plan effectively and ensure compliance with applicable laws and NCF policies and will aid in communication between your affiliated fund and NCF. This checklist must be completed for every event conducted by an affiliated fund of the Nebraska Community Foundation that includes fundraising elements. It is a "living document" that should be shared with NCF throughout the process as you prepare for the event.

Name of Affiliated Fund: Click here to enter text.

Event Chairperson

Name Click here to enter text.
Phone Click here to enter text.
Email Click here to enter text.

Date Completed	Completed By	Activity & Timing	Follow-up Required
Click here to enter text.	Click here to enter text.	1. Discuss goals for the proposed event with your NCF staff lead. *(as soon as you begin considering an event)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	2. Provide your NCF staff lead with details of the proposed event in writing, including *(4-6 months prior to event)*: • Complete description of activities that will take place at the event • Fundraising components of event (e.g., admission, auction) • Expected # of attendees • Budget for event costs and revenue goal	Click here to enter text.
Click here to enter text.	Click here to enter text.	3. Review "Guidelines for Fundraising Events" document to be provided by NCF *(4-6 months prior to event)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	4. Provide draft copy for any press releases, news articles and other printed material to NCF prior to release *(2 weeks prior to printing date)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	5. Agreements or contracts must be signed by an NCF officer, not by a representative from the affiliated fund(*2 weeks prior to date contract must be signed)*: • Contracts with the facility where the event will be held • Contracts or agreements with individuals or	Click here to enter text.

		companies providing food, entertainment or other goods or services	
Click here to enter text.	Click here to enter text.	6. Complete insurance Special Events Questionnaire, call NCF Accounting to obtain this form and return it to NCF *(1-2 months prior)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	7. Discuss ticket prices with NCF Accounting to ensure that sales tax and charitable receipting issues are addressed *(2 weeks prior to printing tickets, invitations or other publicity)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	8. If the event includes a meal, live and/or silent auction, discuss the following with NCF Accounting *(1 month prior to event and before printing event program/catalog)*: • Obtaining a Nebraska Resale or Exempt Sale Certificate (Form 13) to provide to the event caterer • Documenting contributions of auction items as they are received • Documenting fair market value of auction items • Whether and how fair market value of auction items should be disclosed at event and in printed materials	Click here to enter text.
Click here to enter text.	Click here to enter text.	9. If auction items include firearms, discuss with NCF Chief Financial Officer *(prior to acquiring firearms for the auction)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	10. Inform NCF whether alcohol will be served at event. *(1-2 months prior to event)* If yes, confirm to NCF that: • No affiliated fund money will be used to purchase alcohol • Alcohol will be served only by an entity with a liquor license at a cash bar, and the liquor license holder will retain all proceeds	Click here to enter text.
Click here to enter text.	Click here to enter text.	11. Confirm to NCF that the event will not include a raffle or lottery (NCF does not have nor does it qualify for a gaming license and cannot meet the small raffle/lottery exception).	Click here to enter text.
Click here to enter text.	Click here to enter text.	12. Contact NCF Accounting to obtain forms for recording event proceeds and populate with information regarding auction items *(1-2 weeks prior to event)*	Click here to enter text.
Click here to enter text.	Click here to enter text.	13. Submit gross receipts from the event to NCF within one week following the event • Contact NCF Accounting to discuss required information related to the event gross receipts	Click here to enter text.