



NCF AFFILIATED FUND EVENT GUIDELINES & CHECKLIST

May 2023

The following guidelines are for reputational and fiduciary risk management of NCF and all its affiliated funds. Please review these guidelines and complete the checklist in the timelines indicated. Please be in frequent communication with NCF staff members, especially your Affiliated Fund Development Coordinator, to determine the best course of action for your proposed event.

In planning your event, you want to make decisions that maximize attendance and participation, paying attention to welcome those in your community who may otherwise be left out. **NCF asks you to consider these questions and accommodations that will help make your event more welcoming and inclusive to all:**

Inclusivity considerations:

- Is anyone able to attend this event, no matter their abilities?
 - Is there accessible parking available?
 - Is there elevator or ramp access?
 - Is enough seating available?
- Do we need to make accommodations for those who want to attend but English is not their first language?
- Will everyone be able to hear? Should accommodations be made for those who need assistance?
- Are our printed materials easy to read for those who have visual impairments?
- Does our menu take those with dietary needs into consideration?
- Is our event cost prohibitive?
- Are our promotional efforts welcoming to all?

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 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: _____

Event Chairperson

Name: _____

Phone: _____

Email: _____

| Date Completed | Completed By | Activity & Timing | Follow-up Required |
|----------------|--------------|--|--------------------|
| | | 1. Discuss goals for the proposed event with your NCF staff lead. <i>(as soon as you begin considering an event)</i> | |
| | | 2. Provide your NCF staff lead with details of the proposed event in writing, including <i>(4-6 months prior to event)</i> : <ul style="list-style-type: none"> ▪ 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 | |
| | | 3. Review “Guidelines for Fundraising Events” document to be provided by NCF <i>(4-6 months prior to event)</i> | |
| | | 4. Provide draft copy for any press releases, news articles and other printed material to NCF prior to release <i>(2 weeks prior to printing date)</i> | |
| | | 5. Agreements or contracts must be signed by an NCF officer, not by a representative from the affiliated fund <i>(2 weeks prior to date contract must be signed)</i> : <ul style="list-style-type: none"> ▪ Contracts with the facility where the event will be held ▪ Contracts or agreements with individuals or companies providing food, entertainment or other goods or services | |
| | | 6. Complete insurance Special Events Questionnaire, call NCF Accounting to obtain this form and return it to NCF <i>(1-2 months prior)</i> | |
| | | 7. Discuss ticket prices with NCF Accounting to ensure that sales tax and charitable receipting issues are addressed <i>(2 weeks prior to printing tickets, invitations, or other publicity)</i> | |
| | | 8. If the event includes a meal, live and/or silent auction, discuss the following with NCF Accounting <i>(1 month prior to event and before printing event program/catalog)</i> : <ul style="list-style-type: none"> ▪ If food is served, use a third-party vendor if possible. ▪ 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 | |
| | | 9. If auction items include firearms, discuss with NCF Chief Financial Officer <i>(prior to acquiring firearms for the auction)</i> | |
| | | 10. Inform NCF whether alcohol will be served at event. <i>(1-2 months prior to event)</i> | |

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| | | <p>If yes, confirm to NCF that:</p> <ul style="list-style-type: none"> ▪ 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 | |
| | | <p>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).</p> | |
| | | <p>12. Contact NCF Accounting to obtain forms for recording event proceeds and populate with information regarding auction items <i>(1-2 weeks prior to event)</i></p> | |
| | | <p>13. Submit gross receipts from the event to NCF within one week following the event</p> <ul style="list-style-type: none"> ▪ Contact NCF Accounting to discuss required information related to the event gross receipts | |

If you have any questions regarding these protocols, contact your Affiliated Fund Development Coordinator or Nebraska Community Foundation at 402.323.7330 or info@nebcommfound.org.