



Dear Friends of The LAM Foundation:

Thank you for your interest in raising funds for The LAM Foundation in support of our mission to seek safe and effective treatments, and ultimately a cure for lymphangioleiomyomatosis (LAM). We sincerely appreciate the efforts of all individuals, families and organizations, large and small, who are empowered to build awareness, advocate and raise money for their loved ones and every person affected by LAM.

Community fundraising events are vital to the success of The LAM Foundation, enabling us to keep overhead costs low, cultivating creativity and autonomy of supporters who have a passion for making a difference and, most importantly, generating a significant portion of the budget that funds LAM research and patient support. We want to support you in ways that give you independence in planning and executing your event while assuring that we meet federal compliance guidelines and safeguard the integrity of The LAM Foundation.

We created the **Community Fundraising Packet** to help you organize a successful event, outline how the Foundation will provide support and assure that everyone follows applicable guidelines. Community fundraising events can range from letter writing campaigns and online appeals to golf outings and galas – and beyond! Whatever your goals, advanced planning and understanding of non-profit rules are important. Please take time to review this packet and call us with any questions.

As you will read, the Foundation provides many resources to support you, including:

- Community Fundraising Packet with guidelines, application
- Communication support via e-blasts, social media, and Foundation publications
- Promotional materials for loan, such as banners, and giveaways for purchase
- Sharing of best practices, connection with other LAM fundraising families and staff coaching to help you utilize available tools
- Access to our online donor portal and webpage support for approved events
- Accounting support for sending thank you letters and IRS tax receipts

To get started, review this packet and submit the Community Fundraising Application & Agreement along with the Budget Form. Our staff will contact you within 3-5 business days to review your application and answer questions. If at any time you have questions, please contact us at development@thelamfoundation.org at 513-777-6889.

Your support will make a difference! Thank you!

Warmest regards,

Susan E. Sherman, MHA
Chief Executive Officer

COMMUNITY FUNDRAISING POLICY

Thank you for your interest in soliciting donations and/or holding a fundraising event to benefit The LAM Foundation (“Foundation”). The Foundation’s goal is to positively contribute to the quality of life in the LAM community and to ultimately find a cure for LAM. While times and direction may change, the Foundation’s mission endures: *To urgently seek safe and effective treatments, and ultimately a cure, for lymphangiomyomatosis (LAM) through advocacy and the funding of promising research. We are dedicated to serving the scientific, medical and patient communities by offering information, resources and a worldwide network of hope and support.* Achieving this mission is only possible with the generous support of individuals, families, and organizations that help raise funds to benefit the Foundation.

This Community Fundraising Policy (“Policy”) provides guidelines to prospective fundraisers and their advisors. The Foundation is grateful for all external support and its goal is to help make all fundraising activities organized on its behalf a success while safeguarding the integrity of the Foundation and ensuring that IRS compliance regulations are met. Before an individual, family or organization (the “Fundraiser”) begins planning a community fundraising activity (“Event”) planning process; they must review and sign the Policy. The guidelines and provisions of the Policy shall apply to all gifts received by The LAM Foundation for any of its programs or services.

The LAM Foundation Community Fundraising Guidelines

1. **Agreements:** The Foundation’s Community Fundraising Application & Agreement and Budget Form are to be submitted at least 6 weeks (6 months is advised for larger events) in advance of the proposed Event with the box checked acknowledging that Fundraiser has read and agrees to the policies outlined herein. Please initial the bottom of each page, indicating you have read and understand our policies. Written or verbal approval from the Foundation will be provided within 3 to 5 business days from receipt of the application. The Event is not authorized until approved by the Foundation. Once approved, Fundraiser will receive a Sponsor Letter present to potential donors and sponsors verifying that proceeds will benefit the Foundation.
2. **Bank Accounts:** The Foundation **does not** permit Fundraiser to open bank accounts or DBA (“Doing Business As) bank accounts for Events using the Foundation’s EIN number, nor will the Foundation open accounts on Fundraiser’s behalf.
3. **Budget:** Overall expenses for the Event should stay at or below 30% of gross revenues, not including the value of in-kind donations. It is recommended that the majority of Event related expenses be covered by in-kind donations or be contributed by the Fundraiser. As part of this packet, Fundraiser will complete a Budget Form that will help you estimate revenue and expenses. Events projected to raise more than \$15,000 may qualify for additional support from the Foundation and be classified as a Signature Event. Please contact the Foundation for more information.

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4. **Expenses:** Fundraiser agrees to pay all expenses associated with the Event including collection and transmittal of the donations to The LAM Foundation. The LAM Foundation may pay certain pre-approved expenses provided that sufficient funds have been deposited in support of the Event prior to the expense request and is within budget. Fundraiser can request approval for pre-paid expenses using the **Community Fundraising Check Request Form**. Only significant expenses will be considered for pre-payment by the Foundation, for example, greens fees prior to golf outings.

5. **Use of The LAM Foundation Logo and Creation of Marketing and Promotional Materials:** Fundraiser agrees to pay all expenses associated with developing and printing promotional and marketing material for the Event authorized hereunder (“Materials”), and further agrees to designate the beneficiary of the fundraising program as “The LAM Foundation.” No specific designation of funds shall be advertised without the express consent of the Foundation. Fundraiser agrees to obtain written approval by the Foundation office before using, publishing, disseminating or displaying the materials. Fundraiser agrees to include the following disclaimer on all materials: “The LAM Foundation name is used with its permission, which in no way constitutes an endorsement, express or implied, of any product, service, company, individual or political position.” Materials with limited space may say, “*ABC Event* to benefit The LAM Foundation.” Fundraiser also agrees to include the following contact information on all Materials: “For more information about The LAM Foundation, please call 513-777-6889 or email info@thelamfoundation.org.”

When using The LAM Foundation logo, please do not separate the name from the graphic. The logo may be printed in black and white or in the colors provided by the Foundation. The logo(s) may not be printed in any color other than those provided, or altered without prior approval. Additional annual or theme logos may be provided by the Foundation for use by the Fundraiser.

6. **Net Proceeds and Holdback for Future Events.** Fundraiser agrees to forward one hundred percent (100%) of the net proceeds after expenses to the Foundation office. In cases where Fundraiser has held prior successful events to benefit The LAM Foundation with more than \$5,000 in net proceeds, a 10% holdback for future events can be accommodated. These funds will be managed by the Foundation and a letter confirming the amount will be sent to the Fundraiser after closing the final bookkeeping for the Event. Fundraisers must hold another Event no more than fourteen (14) months after the prior year Event. After such time, and if no subsequent Event is held, funds will be deposited into the Foundation’s general fund for use toward mission-related activities.

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All checks are payable to “The LAM Foundation” and are to be mailed to the Foundation within two weeks of donation collection date. Post event, all checks should be mailed no later than two weeks after the Event. It is recommended that Fundraiser mail checks via Priority Mail and acquire a tracking number. Mailing cash is prohibited. Please obtain a money order or cashier’s check to mail cash donations. A ledger documenting total number of checks, amounts and total deposit should be included when mailing a group of checks. Mail checks and ledger to:

The LAM Foundation
4520 Cooper Road, Suite 300
Cincinnati, OH 45242

- 7. Tax Receipt Letters.** The IRS requires that The LAM Foundation inform donors of the fair market value of goods and services provided in exchange for their contribution, including a statement that only the portion of their contribution in excess of the fair market value provided is tax-deductible. If Fundraiser plans to hold an Event where goods and services will be provided to attendees (for example, a meal, golf outing, or auction), they must contact the Foundation prior to printing invitations or sending out any other materials publicizing the Event so that compliance with disclosure requirements is met.

It is reasonable and customary for donors to expect an acknowledgement and/or tax receipt of donations collected during fundraising activities. While the Foundation encourages Fundraisers to thank all attendees and donors for supporting an Event, official tax receipt letters must come from the Foundation. A donation is only tax deductible when the amount given is greater than the value of the goods and services received.

For example, if a participant pays \$200 to participate in a golf outing, and the cost per golfer is \$50, the tax-deductible amount is \$150. We recommend that you include the value of the goods and services received on any printed tickets, receipts, etc.

- 8. Raffles and Gaming.** To maintain its non-profit status, the Foundation must comply with all federal, state and local requirements and laws. If you plan on conducting a gaming activity (raffle, poker tournament, etc.), or to serve or sell food and beverages, please be sure to verify your local law(s) regarding any permit(s) required. The Foundation staff can help you with this. Payments for raffle tickets and other gaming activities are not tax-deductible.
- 9.** Fundraisers should request the In-kind donation letter from the Foundation for donors requesting acknowledgement of non-cash contributions for tax purposes.
- 10.** Fundraiser may not distribute any of The LAM Foundation proprietary information. This includes fundraising guidelines, mailing lists, sample forms, etc.

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11. Fundraiser agrees to comply with all federal, state and local charitable solicitation statutes, regulations, and ordinances that affect or apply to you and the fundraising activities authorized hereunder.
12. All Event organizers are responsible for providing insurance as required by law or established business practice. The LAM Foundation cannot be responsible.
13. The Fundraiser hereby fully releases and agrees to hold harmless The LAM Foundation, its Officers, Directors and representatives of and from any liability, claims, damages, expenses or cases of action for any reason.

The Foundation is sincerely grateful to the many Fundraisers who give their time, energy and creativity to raise funds in support of The LAM Foundation. To demonstrate agreement to the terms and conditions of these guidelines, review the items in the Community Fundraising Packet, fill out The LAM Foundation Community Fundraiser Application and Agreement as well as the Budget Form, and submit to the Foundation at development@thelamfoundation.org or by mail.