



NAVY SPECIAL OPERATIONS FOUNDATION

Independent Fundraising Guidelines

We would like to express our sincere gratitude for your interest in supporting the Navy Special Operations (NSO) Foundation. Our mission is to ensure our families are provided with all the tools necessary to overcome any challenges they may face and let them know they are never alone in the fight! By supporting events such as yours we are more effectively able to promote our programs and raise public awareness for the brave men and women of this community.

An independent fundraising event is an event or activity that is conducted for the purpose of generating revenue to support the mission of the NSO Foundation. The NSO Foundation can be a full or partial beneficiary of these types of events, and it is our hope that your efforts will serve to inspire individuals, groups, and other organizations to be impactful ambassadors for this community.

It is not our intention to unduly restrict or discourage your efforts, but rather to provide sufficient guidelines that will assist you in this process. After reading these guidelines and completing the application an event organizer can become more familiar with what will be required prior to beginning this process so the most effective fundraiser possible can be achieved.

How can the NSO Foundation help with your event

- We will validate your authority as an individual/organization raising funds on behalf of the NSO Foundation, which will bring legitimacy to your fundraising efforts.
- Provide consent to use the NSO Foundation logo on all official correspondence and marketing materials on behalf of the event.
- Will provide tax receipts to all donors who make contributions directly to the NSO Foundation which will serve as a beneficial enticement to those wishing to make deductible donations for tax purposes.

How to Get Started

Please read the entire fundraising agreement, complete all required information on the application form and await for a response prior to initiating event execution. If it is necessary to submit supplementary information, please email to robyn@nsfoundation.org and reference the event you are organizing.

Approval of Event

- Approval for this event is contingent upon the date(s) indicated on the application. The use of the Logo and Foundation name is limited to this date(s) only. This process must be repeated for annual events or those events that are repeated in the future.
- The ability of the NSO Foundation to directly participate by providing representatives to attend the event is dependent solely on resources available.
- All travel and lodging expenses incurred by Foundation (related specific to event) will be the responsibility of the organizers to fund.
- Commission based on fundraising percentages prohibited.
- Events that promote a political candidate or party are prohibited.
- Direct solicitation is prohibited (telemarketing, door to door canvassing, etc).
- The NSO Foundation will not solicit on behalf of your event and is not obligated to provide any donor, volunteer, or other individual contact information.
- The NSO Foundation will provide reasonable support to include brochures, social media marketing, and other relevant informational materials at its discretion.
- Use of the Navy Special Operations Foundation logo on any promotional materials to include but not limited to, digital or printed advertising, brochures, flyers, press releases, etc. requires explicit approval prior to production or circulation.
- Do not make public announcements or advertise any event or related materials until explicit approval has been given by the NSO Foundation.
- The NSO Foundation does not endorse products, firms, organizations, individuals, or services. Please ensure your event or any part thereof does not provide an endorsement of anything outside of the stated mission and guiding principles of the NSO Foundation.
- When used in official correspondence or marketing use only Navy Special Operations Foundation. The abbreviation NSO Foundation or NSOF are acceptable DBA terms to use outside of official marketing, advertising, or other such communications.
- The Navy Special Operations Foundation may be the only identified beneficiary of event unless specific authorization has been approved regarding a joint venture with event organizers.
- All promotional and support material must clearly indicate that the event is being held to benefit the Navy Special Operations Foundation and/or how exact proceeds will be distributed.
- Do not advertise that event will involve active duty NSO members.
- Do not use the NSO Foundation logo to create any websites, social media pages, or other digital formats without express written consent provided.
- The NSO Foundation reserves the right to approve/disapprove any featured speaker, MC, performance, etc. for any event, therefore we encourage the event organizer to receive prior approval before booking.
- The NSO Foundation reserves the right to be present and provide remarks as appropriate at the event.
- The NSO Foundation will make every attempt to garner outside support, media attention, and social media coverage to make event successful, but ultimately this is the responsibility of event organizer.
- If for any reason the NSO Foundation believes an event may be detrimental to its interests or is operating contrary to these guidelines, the right will be reserved to withdraw support for said event.

Insurance, Permits & Licenses

- Event organizer must obtain and show proof of liability insurance to cover event venue and participants. If liquor license is required, event organizers must also provide at their expense. Please add Navy Special Operations Foundation as additional insured to the policy and provide a copy to Foundation as soon as received.
- Event organizer shall indemnify and hold harmless the Navy Special Operations Foundation from liabilities, losses, and expenses arising from the event or promotion of the event.
- It is the responsibility of the event organizer to determine the local, state and federal requirements that may be applicable to all aspects of the event process, to include the fundraising rules and regulations for that locale.

Solicitation of Donations, Sponsors, and In-Kind

- To ensure efforts are not duplicated and businesses or individuals are not being burdened by multiple requests, please supply us with a list of intended targeted sponsors for event prior to approaching.
- Event organizers must maintain effective communications with all donors and ensure the NSO Foundation is made aware of all intended contributions so necessary receipts and processing can occur.

Event Expenses and Income

- The NSO Foundation cannot serve as the fiscal agent responsible for the event and cannot pay upfront costs associated with said event.
- If you must purchase goods or services for your event determine if the event will generate enough income to reimburse your expenses.
- The NSO Foundation cannot reimburse you for expenses unless prior written approval without exception.
- Event planners or other professional organizers may not take a fee, commission, or salary for event.
- It is prohibited to setup a bank account in the name of the Naval Special Operations Foundation.
- Checks payable to the NSO Foundation must be sent within 10 days of receiving.
- All proceeds (net revenue), after expenses are deducted and paid in full, must be sent to the NSO Foundation within 30 days following event completion.
- If cash donations are taken and donors request acknowledgement of gift for tax purposes, it is imperative to obtain full name, address, amount, and date which received. This is the sole responsibility of event organizer.
- The NSO Foundation is not considered the sponsor of your event, but the beneficiary, therefore only the final (net) proceeds should be processed by the Foundation.
- It is imperative if finances for event were not controlled by the NSO Foundation that the event organizer maintains and supplies a legible and effective budgetary record to be submitted for review at the conclusion of the event.

NOTE: ONLY INDIVIDUAL DONORS WHO HAVE WRITTEN CHECKS OR MADE PAYMENT DIRECTLY TO THE NAVY SPECIAL OPERATIONS FOUNDATION WILL RECEIVE ACKNOWLEDGEMENT FOR TAX PURPOSES.

Additional Guidelines

- Do not establish a bank account in the name of the NSO Foundation under any circumstances.
- If payments are made to the organizer these payments will NOT be acknowledged by the NSO Foundation as tax deductible contributions.
- Products sold at event are not tax deductible.
- Consult with a tax advisor prior to making contributions, the NSO Foundation is not responsible for providing legal advice.
- Fundraising standards recommend that no more than 25% of gross revenue of an event should be spent on expenses. At least 75% of the gross revenue collected should be allocated to the NSO Foundation at the conclusion of event to maintain the integrity expected within charitable fundraising protocols.
- Any advertising for event should be explicit in where proceeds will be allocated.
- It is required to develop a budget plan at the initial stage of planning process and supply it to the NSO Foundation to ensure it is within reasonable standards (25/75 rule).
- The NSO Foundation should be notified at least 8 weeks prior to the event taking place.
- The NSO Foundation reserves the right at any time to direct the event to be terminated or to deny future events from occurring.
- As an event organizer you are acting in the capacity as an ambassador on behalf of the NSO Foundation. As such this does NOT imply authority to sign or agree to contracts or verbal/written agreements on behalf of the NSO Foundation at any time.

Independent Fundraising Application

Please direct inquires for your event to Robyn Cockrell at 757-656-9769 or email robyn@nsfoundation.org. Please allow up to 5 business days for us to respond to your request.

Full Name

Mailing Address

Email

Phone

Proposed Fundraiser Date

Proposed Fundraiser Location

Description of Fundraiser

Estimate of Participants/Patrons

Estimate of Projected Revenue

Has this event occurred in the past? If so, please provide details.

Is the NSO Foundation the primary beneficiary? If not, what are the other charities and allocation percentages?

List of all potential corporate sponsors

Support being requested from the NSO Foundation at this time

Email a detailed budget proposal and any other supplemental documents to robyn@nsfoundation.org.

Please check each of the following boxes after reading:

- I have read and agree to comply with all written guidelines.
- I understand I must wait for written approval of this application prior to executing event.
- I understand that publicity and other marketing for event must be approved by the NSO Foundation.
- I understand I am not allowed to distort or misuse the NSO Foundation logo.
- I understand that the NSO Foundation does not own the rights to use the EOD/ND emblems and these are owned by the U.S. Navy.
- I understand I am prohibited from using language indicating active duty service members will be present or have involvement with any event.
- I understand I must receive approval of any speakers, performers, MC, etc. that will be acting in an official capacity at the event.
- I understand I must turn over net proceeds to the NSO Foundation and a completed budget form indicating all revenues and expenses incurred within 30 days from conclusion of event.
- I agree to indemnify and hold harmless the Navy Special Operations Foundation, its directors, employees, and other representatives, for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any term or provision of the NSO Foundation. The NSO Foundation will not provide insurance for independent fundraising events.
- NSO Foundation reserves the right to accept or deny any requests for independent fundraising events, as well direct an event to be terminated at any time.

Agreement

I have read and fully understand the Independent Fundraising Guidelines set forth by the Navy Special Operations Foundation. Please print and sign this document and return along with a proposed budget. The initial review may take up to 5 business days, if you are not contacted please call Robyn Cockrell at 757-656-9769 or email robyn@nsfoundation.org.

Signature

Printed Name

Date

APPROVAL OF EVENT (to be completed by NSO Foundation)

Signature

Full name/title of approver

Date of approval