



**All proposals must be submitted at least (8) eight weeks prior to the event. Once the proposal has been approved, you will be notified**

**THREE EASY STEPS TO GET STARTED:**

- 1) Read the Independent Fundraising Events Guidelines (click here...link to PDF)
- 2) Fill out and submit the fundraising proposal
- 3) Wait to receive an email approval before utilizing the EOD Warrior Foundation name, logo or likeness

**Independent Fundraiser Procedures**

Thank you for your interest in hosting a fundraiser to support the EOD Warrior Foundation. Our mission is to improve the quality of life for the EOD family by providing financial relief, scholarship opportunities, physical, social, and emotional support. We are truly grateful for the generosity and support of those who share our commitment to this elite community! Events such as yours are important in the Foundation's efforts to raise funds and awareness about the dangerous, critical and lifesaving work that EOD warriors do every day.

**WHAT WE ASK OF YOU:**

The EOD Warrior Foundation has a set of guidelines, we ask you to follow when fundraising on our behalf. We do not wish to seem ungrateful for your efforts, or wish to burden you with unnecessary limitations; however, through years of experience we have found that by clearly identifying expectations, we can avoid misunderstandings or negative experiences. We have implemented these guidelines to protect your interests, as well as the interests of the supporters of your event and the EOD Warrior Foundation. We ask that you read the entire fundraising policy agreement prior to completing the fundraising proposal.

### **Independent Fundraising Events Guidelines:**

The following activities are prohibited in conjunction with events for the EOD Warrior Foundation:

- Programs that raise money on commission
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity; and
- Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or internet)

### **EVENT APPROVAL AND FOUNDATION ASSISTANCE**

- Approval for the event is specific to the dates you indicate on the application. The use of the Logo and Foundation name is limited to these dates. If you intend to repeat the event, you must submit a new request.  
Please understand the volume of requests typically exceeds the number of EOD Warrior Foundation members available to attend events.
- While we will do our very best to provide the representatives you may have requested, we cannot guarantee attendance of staff, volunteers, or military personnel at the event.
- All travel and lodging costs incurred by the speaker or representative will be the sole responsibility of the event organizers.
- The EOD Warrior Foundation will not solicit sponsors or auction items for your fundraising event - and does not provide any donor, volunteer, or celebrity contact information, mailing lists, press contacts, press releases, or formal advertising. Event organizers should have their own list of potential contributors or participants.
- As requested and appropriate, the Foundation will provide brochures, pamphlets, and other informational materials, promoting and explaining the EOD Warrior Foundation. Please let us know your needs in this area as soon as possible so we can make sure we have sufficient quantities for your event.
- As appropriate and approved, we will include your event in the Foundation's electronic and social media outlets.

### **PROMOTION & LOGO USAGE**

- Use of the EOD Warrior Foundation logo on any promotional materials including, but not limited to, advertising (electronic and print), letters, brochures, flyers, and press releases, must be approved in writing by the Foundation. Please do not make public announcements or promote the event until you receive written approval from the Foundation of your fundraising proposal. If there is an error in the print material(s), without approval from the EOD Warrior Foundation we have the full authority to request reprints and/or revisions, at the financial expense of the event host.
- The EOD Warrior Foundation does not endorse products, firms, organizations, individuals, or services. Accordingly, your event(s) must be promoted and conducted in a manner that avoids any statement or appearance of an endorsement by the EOD Warrior Foundation.
- The full name of the Foundation is the 'EOD Warrior Foundation' and the Foundation should be identified by its full name in first reference in all materials pertaining to the event. The term

'Foundation' (capitalized) may be used sparingly after the first reference. Please do not use any other interpretation or variance of the Foundation name.

- The EOD Warrior Foundation may only be identified as the beneficiary of your event. For example, you should not call an event "The EOD Warrior Foundation 5K." Rather, the event should be promoted as the "5K to benefit the EOD Warrior Foundation" or "5K benefitting the EOD Warrior Foundation". This pertains to all marketing/promotional items (print and electronic).
- Promotions for event must reflect the EOD Warrior Foundation as the beneficiary, not the host, presenter, or sponsor (for example, "proceeds from this event will benefit the EOD Warrior Foundation").
- If the event is having a featured speaker, emcee, performers, etc., the Foundation requests review and approval to ensure alignment with EOD Warrior Foundation standards, values and ethics. All speaking topics must be nonpartisan in nature.
- The EOD Warrior Foundation cannot guarantee or secure media coverage (television, radio, or print). Contact with the media about the event or promotion may be made, provided that the host communicates with the EOD Warrior Foundation about all arrangements made, and provided the EOD Warrior Foundation talking points are used as the basis of discussion with the media. The EOD Warrior Foundation does not purchase advertising to promote independent events.

### **EVENT INSURANCE, LICENSES & PERMITS**

Event organizers must obtain their own liability insurance to cover the event. If a liquor license is required, it is the responsibility of the event organizers to obtain such license. Please add the 'EOD Warrior Foundation, Inc.' as an additional insured to your insurance policy. A copy of the Certificate of Endorsement page needs must be emailed to the EOD Warrior Foundation no less than two weeks prior to the event: [lauren@eodwarriorfoundation.org](mailto:lauren@eodwarriorfoundation.org).

The EOD Warrior Foundation is not responsible for providing liability insurance for the event. Event organizers shall indemnify and hold harmless the EOD Warrior Foundation from liabilities, losses, and expenses arising from the event or promotion.

### **SOLICITATION OF CORPORATE DONATIONS, SPONSORSHIPS, AND IN-KIND DONATIONS**

In order to better coordinate fundraising events, we ask that you provide us with a list of targeted sponsors for your event **BEFORE** they are approached. Please remember that many individuals and businesses already support the Foundation and may not wish to make additional donations.

### **EVENT EXPENSES AND INCOME**

The EOD Warrior Foundation may not serve as the fiscal agent for the event, i.e. The EOD Warrior Foundation may not cover certain (or all) expenses for the event. In addition, event organizers must comply with all local and state laws and purchase any necessary permits and licenses. Prior to the EOD

Warrior Foundation agreeing to cover any expense a full budget including both estimated expenses and funds to be raised. No expense will be covered without prior approval from the Foundation.

Some other guidelines and items to consider:

- Determine whether or not the event will generate enough income to reimburse you for the expenses
- Event planner/host may not take a fee, commission, or salary from the event
- Because the EOD Warrior Foundation is not sponsoring your event, we cannot have event revenues and expenses managed by the Foundation. Only the net amount (final net proceeds) should be processed by the Foundation.
- Financial accounts set-up in the name of the EOD Warrior Foundation are not permitted.
- Checks made payable to the EOD Warrior Foundation must be sent to the Foundation for processing within 10 days from receipt.
- As a fundraiser being promoted as benefitting the EOD Warrior Foundation, all proceeds (net revenue), after deducting expenses, must be sent to the Foundation.
- If cash donations are taken (which is discouraged) and donors request an acknowledgement of their gift for tax purposes, the following legible information must be collected and reconciled with the proceeds given to the Foundation: name, address, amount given, and date given. Collection of information is the sole responsibility of the event organizers.

**FINANCE AND TAX RULES**

The EOD Warrior Foundation will process only the final net proceeds of event(s). Under no circumstances will event's revenues and expenses flow through the EOD Warrior Foundation's accounts. The EOD Warrior Foundation must receive all net proceeds within ten (10) business days of the conclusion of each event and/or promotion. **NOTE: Only your individual donors who have written checks directly to the EOD Warrior Foundation will receive an official acknowledgement from the EOD Warrior Foundation.**

- You may not establish a bank or other deposit or transaction account in the name of the EOD Warrior Foundation.
- If payments are made to the organizer, and the event organizer is not an IRS qualified organization, the payments will not be deductible for income tax purposes.
- Items sold at the event are not tax-deductible.
- If the payments are made to the EOD Warrior Foundation, donations are typically tax deductible, though you should consult your tax advisor.
- The EOD Warrior Foundation's sales tax exemption(s) (on purchases) cannot be extended to any event or fundraising effort.

- In keeping with fundraising standards, no more than 25% of gross revenue from the event may be spent on event expenses.
- A mutually agreed upon budget must be presented by the event organizer. Expenses and revenues must be monitored and managed throughout the planning and execution of the event to stay within the previously stated ratios. Mutually agreed adjustments will be made to stay within the same ratios.
- If you are deducting expenses before sending net proceeds to the Foundation, you may not state or imply to your donors that any funds given to you are tax- deductible. A donation solicited on our behalf is fully tax-deductible only when it is made directly and entirely to the EOD Warrior Foundation.
- A financial statement must be presented, along with the proceeds, within thirty (30) days of the event's conclusion.

### **LIABILITY AND CANCELLATION**

All independent events must do the following:

- Comply with all federal, state and local laws applicable to any event, including fundraising rules and regulations.
- Determine the extent of and obtain its own liability insurance for the event sufficient to cover any claim that may arise out of the event. The EOD Warrior Foundation will not provide our liability insurance for independent events regardless of special circumstances that may arise.
- The independent event organizer agrees to indemnify and hold the EOD Warrior Foundation harmless from and against any and all losses, damages, costs, attorney's fees, expenses, and liabilities incurred in connection with, or with the defense of, any claim or action or proceeding arising out of or incurred in connection with the event.
- Obtain all permits and/or licenses necessary for fundraising in the city in which the event is to occur, the sale or service of liquor, and the hosting of raffles and/or games of chance. The EOD Warrior Foundation's Director of Events must see all signed copies of permits and approve them prior to approval of the event.
- Inform invitees and participants that the event is not produced, supervised or sponsored by the EOD Warrior Foundation and that the EOD Warrior Foundation is neither responsible nor liable for any acts or omissions related to the event.
- If circumstances warrant, the Foundation may at any time direct the event to be terminated or deny future events by the fundraising host for failure to comply with the IFE protocols.
- You hereby agree to cancel the event if directed, and further agree to release the Foundation from any and all liability from such action.
- You agree to notify EOD Warrior Foundation in writing if there are any significant changes to the event once it has been approved. If circumstances warrant, EOD Warrior Foundation may at any

time direct you to remove EOD Warrior Foundation as a beneficiary of the event.

On behalf of the EOD Warrior Foundation Board of Directors, staff and the EOD families we serve around the world, we express our sincere gratitude for your desire to support the EOD community, and for helping us to achieve our mission. Truly, we could not do this without you.