



General

Philanthropy Tool Kit

Updated January 2018

Topics Covered

Talking About Alpha Phi Foundation
Building a Time line and Budget
Sponsorships
Community Contributions Program
Insurance & Contracts
Alcohol Policy & Event Planner Forms
Ticket Sales
Alumnae Attendance & Involvement
Donations Policies & Procedures
Event Wrap-up

Letter from the EO

Dear Sisters,

Let me be the first to say *thank you*. Thank you to you *and* your chapter for choosing to believe in the mission of Alpha Phi Foundation: *to advance women’s lives through the power of philanthropy*.

Before you begin planning your philanthropy event, it’s important that you pause to recognize your *why*—why do you believe in Alpha Phi Foundation? Once you know what motivates you, it’s up to you to share that purpose with all of your sisters so they can find their why, too.

The passion and support of Alpha Phis, like you, enable the Foundation to provide opportunities and grants for leadership, learning and advancement in women’s heart health.

Together, we can change futures. Together, we help empower women to become leaders on their campuses, in their communities and in the world. Together, we can make a difference. Your support of Alpha Phi Foundation is an investment in all the women who join this sisterhood—and the women they will become because of it.

Loyally,

Lizzie Hineman
(Gamma-DePauw)

Manager of Chapter Giving & Communication

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Mission & Vision

About the Foundation

Alpha Phi Foundation made history on April 15, 1956 when it received its non-profit designation. Alpha Phi became one of the first women's fraternities to establish a foundation.

Demonstrating the philanthropic spirit of love and charity intended by our Founders, the Foundation was first created as a trust to award grants specifically for scholarship and cardiac aid. Today, Alpha Phi Foundation is the philanthropic partner of Alpha Phi Fraternity, and the original priorities of the Foundation remain.

The Foundation is well-known and respected internationally as a prominent philanthropic leader in the Greek community.

Mission Statement

**Advancing women's lives
through the power of
philanthropy.**

Through our five vital programs, we are able to put our mission into action. Alpha Phi Foundation supports Alpha Phi Fraternity, our members and the communities in which they reside in their pursuit to advancing women's lives now and into the future.

Our Vision

As a preeminent philanthropic organization, Alpha Phi Foundation is recognized for the strength of our endowment and for innovation in cultivating and sustaining donor participation.

We strive to be the philanthropy-of-choice amongst our members, with every Alpha Phi supporting the Alpha Phi Foundation.

DATE FOUNDED
1956

TAX ID OR EIN #
36-3895478

Alpha Phi Foundation has been classified as a 501(c)(3) organization by the Internal Revenue Service.

Donations to the Foundation are tax deductible in the United States as allowed by law.

The 5 Vital Programs

Before we get into nitty-gritty event details, it's important to take a moment and recognize *your* why.

Why do you choose to support Alpha Phi Foundation?

Why do you believe its mission? How has its programs affected you and your community?

Why is our work important?

Alpha Phi Foundation supports five vital programs that advance women's lives and bolster the strength and character of our sisterhood.

It is your job to inspire your sisters and those around you to believe in the mission of Alpha Phi Foundation and to feel empowered to give their time, gifts and talents to our shared cause.

In giving to the Foundation, you are investing in the advancement of women, especially Alpha Phis. Four (*) of our five vital programs directly impact Alpha Phi and its members.

Leadership *

Alpha Phi Foundation supports Alpha Phis as they develop, grow and empower others in leadership with cutting-edge professional training and programs. The Foundation invests thousands of dollars annually to educational programs led by Alpha Phi Fraternity. These include programs like the Emerging Leaders Institute (ELI), Leadership Fellows, Educational Leadership Consultant (ELC) program and more. [Read More...](#)

Scholarship *

The Foundation awards more than \$210,000 annually in merit-based and need-based scholarships to outstanding undergraduate and graduate Alpha Phis across North America. [Read More...](#)

Women's Heart Health

The Foundation cares about improving women's heart health, and has supported its education and research since Alpha Phi's dedication to the cause in 1946. Each year, the Foundation awards the Heart to Heart Grant to fund research and educational programs that support the improvement of women's heart health. [Read More...](#)

Assistance Grants *

Alpha Phis are sisters for life, supporting one another through every life stage and helping each other in times of need. We exemplify this life-long support through the Forget Me Not Grant Fund. The Forget Me Not Grant is designed to provide temporary, short-term, financial assistance for an event or unforeseeable circumstance. [Read More...](#)

Heritage *

Alpha Phi Foundation is dedicated to collecting, preserving and sharing the history of our organization—a history rich in women's leadership, both within our Fraternity and in our communities as a whole. Alpha Phi Foundation oversees the Alpha Phi archives and funds both the written and oral histories of Alpha Phi International Fraternity. [Read more...](#)

Frequently Asked Questions

Q: Are our donations 100% tax-deductible?

A: Yes. Alpha Phi Foundation is a 501(c)(3) charitable organization, which means that all gifts to the Foundation are tax-exempt to the fullest extent allowed by law.

Q: Who is my point of contact at the Foundation?

A: Your first point of contact should be the Manager of Chapter Giving. S/he should be your go-to person for any questions regarding the Foundation and your philanthropic efforts.

Q: What is the difference between Alpha Phi Fraternity and Alpha Phi Foundation?

A: While our values, vision and location are the same, Alpha Phi Foundation is the philanthropic partner of Alpha Phi Fraternity. Alpha Phi Foundation supports Alpha Phi Fraternity, its members and their communities.

Q: May Alpha Phi chapters use the Foundation's tax-exempt status when planning their events?

A: Unfortunately not. The Foundation and the Fraternity have separate tax-exempt statuses. Alpha Phi Foundation is recognized as a 501(c)(3) organization by the IRS, whereas Alpha Phi Fraternity is recognized by as a 501(c)(7) organization, or social club. Alpha Phi chapters are NOT 501(c)(3) organizations and therefore cannot use the tax-exempt certificate of the Foundation to purchase goods or services.

For individuals and companies who request information about Alpha Phi Foundation—like its mission, contact information or EIN/Tax ID—we encourage you to share the Nonprofit Status Letter with them.

[Download Nonprofit Status Letter](#)

What is a 501(c)(3)?

Section 501(c)(3) is the portion of the US Internal Revenue Code that allows for federal tax exemption of charitable and educational nonprofit organizations.

[Learn More...](#)

Who leads the Foundation?

Today, the Foundation has a nine-member Board of Directors, an Executive Director and a staff dedicated to taking our efforts to new heights.

[Meet the Board of Directors](#)

[Meet the Foundation Staff](#)

How do we make a difference?

Chapter giving helps make our five vital programs possible! Each year we publish a Donor Impact Report to illustrate the power of your philanthropy!

[View latest Donor Impact Report](#)

Things to Consider When Hosting An Event

Philanthropic Goals

Some events are more focused on education and raising awareness—like blood drives and sunset yoga. Other events are more focused on fundraising—like a gala and 5K runs. Additionally, some events are tailored to campus communities and others better target parents and alumnae. Understand what are your chapter's philanthropic goals are and execute.

Last year's event

Has your chapter planned this event before? Did the former planner leave any notes, tips or feedback? What were the successes and challenges of previous events? What could we do better this time around?

Campus Culture

Every campus is different. Ensure that your philanthropy follows the needs and requirements of your campus. It's also important to be socially conscious when planning and branding your events. How will your campus respond to your event? How will your local community respond?

There are countless ways to give back! Each and every year, we see chapters craft up new and creative ways to support the Foundation and have blast in the process! Before you start your event planning though, take some time to evaluate your chapter's goals, needs and budget.

WHAT ABOUT MY BUDGET?

- Is my budget realistic?
- Will we need sponsors for the event?
- Will we need to solicit in-kind donations?
- Should there be an entry or cover fee?
- Will we need to sell tickets beforehand?

WHAT ABOUT THE LOCATION?

- What type of spaces and venues are available to me?
- What spaces and venues are easy to get to?
- Will I need a back-up plan if the weather is bad?
- Is there enough space? Is there a max. capacity?
- Will I need access to utilities or A/V equipment?

WHAT ABOUT TIMING?

- Am I giving us enough time to plan this event?
- Is the time of year ideal for this event?
- What does our social calendar look like? Greek calendar? Campus calendar? Holiday calendar?

WHAT ABOUT THE PEOPLE?

- Who is my target audience?
- How far from the event location does the target audience live?
- How will the target audience get to the event?
- Will the target audience need overnight accommodations for the event?
- Will we need to feed our attendees?

If you have specific questions about your chapter's previous event, do not hesitate to reach out to the former event planner, chapter advisors, other Alpha Phi chapters or the Foundation staff.

Philanthropy Event Bank

RED DRESS

The Red Dress brand can be anything you want it to be—big or small, fancy or laid-back, gala or potluck! Have fun with it and be creative!

- Brunch
- Dance
- Gala
- Casino/Poker Night
- Fashion Show

HEART HEALTH WEEK

These are usually week-long philanthropy events that focus on heart health awareness and education. Sometimes chapters host several types of small events throughout the week.

- Blood Drive
- CPR/AED Training
- Wear Red Day
- Sweetheart Keys

FOOD-BASED EVENTS

Gather your community together for some food and fundraising! Bonus points if your food event is heart-healthy!

- Cook-Off
- Mac N Phis
- Trail Mix Bar
- Bake Sale
- Barbecue
- Restaurant Fundraiser
- Food Truck Festival
- Apple Picking

MOVE YOUR PHIT

These events include any type of event that gets your heart pumping—running, dancing, kickball, 3x3 basketball tournaments or golf—just get to moving!

- 5K Walk/Run
- Zumba-thon
- Dance-a-thon
- Alpha Phifa
- Fast Phit
- Phi Ball
- APhi Bowl
- APhi Open
- Hoops for Hearts
- Yoga

ENTERTAINMENT & PAGEANT

Show off the talents (and competitive nature) of your community with a show!

- Comedy Show
- Lip Sync Competition
- Talent Show
- Fashion Show
- Mr. Heartthrob
- King of Hearts

JAIL & BAIL

Notable community members are “arrested” and must raise their bail money!

- AlphaTraz
- Jail & Bail
- Lock & Key
- Cardiac Arrest
- Jail Break (Partnered obstacle course)



alphaphiewu
Alpha Phi EWU



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Building a Timeline

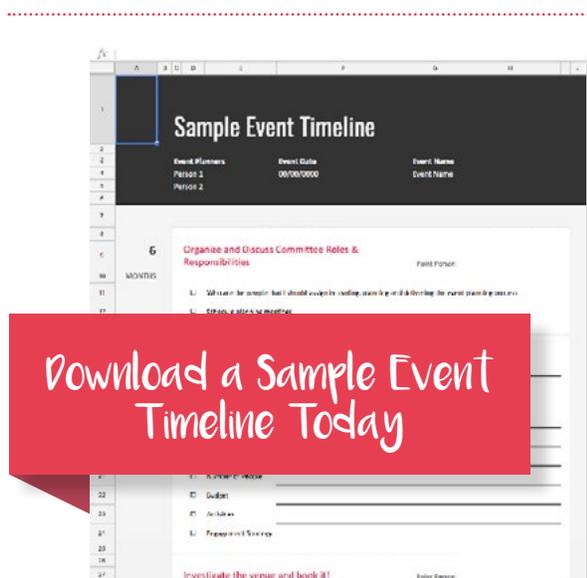
We recommend that you start planning your philanthropy calendar at least six months in advance. A good rule of thumb is to have planned this semester's philanthropy last semester and to be planning next semester's philanthropy this semester. Some things to consider when creating your event timeline are:

If you're going to do it, take your time and do it right. It's easy to get excited and to just start rushing through the motions; however, event-planning takes time. Channel your motivation and make sure that you dot all your i's and cross all your t's. Take the time to solicit donations and secure key sponsorships. Take the time to consider multiple venues to figure which is best. Take the time to market your event and notify all of your local and chapter alumnae.

Consider everyone's calendar and give your attendees plenty of notice. To ensure the best possible attendance at your event, pull up your chapter calendar, Greek life calendar, campus calendar, holiday calendar, etc., and pick a date that's smart and strategic. Send Save the Dates well in advance to make sure your attendees can, in fact, *save the date!*

Secure a venue and work backwards from there. Locking down a venue—whether it's the soccer fields, local theater or banquet hall—is absolutely key to your event. Many of your event details will hinge upon this decision. Sometimes it's helpful to hold off on assembling committees until a venue has been chosen so that the committees know what they're working with (capabilities, restrictions, access, etc.).

Working hand in hand with your VP of Finance is necessary. Together you will determine what type of event(s) make sense for your chapter and budget. Your VPF can help you outline an event budget well in advance of your event. Doing so helps to ensure that your planning and event run as smoothly as possible!



GOOGLE SHEETS RESOURCE

Sample Event Timeline

The Foundation staff has put together a sample event time line to use as a template.

Find and download the template below. Go ahead and make it your own and tailor it to fit your event!



[Download Now](#)

Sample Committee Structure

PUBLICITIY

This team is responsible for getting the word out about your event. They need to be creative, understand how media works and be full of light bulb moments!

- Save the Dates & invitations
- Print, web, email, social, etc.
- Event website or Facebook event
- Press releases

SPONSORSHIP

You'll need a team with excellent relationship skills to develop a rapport with corporate sponsors and to motivate your chapter!

- Sponsorship programs and packets
- Identifies potential sponsors
- Acquisition strategy
- Encourages entire chapter to participate in soliciting and securing sponsors

ENTERTAINMENT & PROGRAM

This team should be fun and outgoing! With the right people in charge of your entertainment, your guests will be looking forward to next year's event.

- Entertainment booking & contracts
- Event program & schedule
- Entertainment, emcee, guest speakers,
- Lighting, A/V equipment, etc.

BUDGET & FUNDRAISING

This team should oversee the flow of cash and donations for your event from start to finish. Ideally, this committee would include the Director of Finance.

- Budgeting
- Data entry and taking donations
- Overseeing check-in/check-out table
- Balancing budget & sending donations

OTHER COMMITTEE IDEAS

Depending on your event, you may decide to install one or some of the following:

- Food Committee
- Decor Committee
- Invite/Thank You Committee
- Volunteer Committee
- Silent/Live Auction Committee
- Raffle Committee

Remember that two heads are better than one...and five heads are better than two.

The above committees are only examples. If there is any aspect of your event that requires or deserves a group effort, go ahead and organize a committee to help plan and implement. Tailor your committees for your chapter and event so that you can be as efficient and successful as possible.

Submit Your Event

Submitting an event to the Foundation is easy to do and comes with benefits! All you need is your event name, basic event details and contact information. Please submit your event to the Foundation at least a month in advance.

Share Your Event!

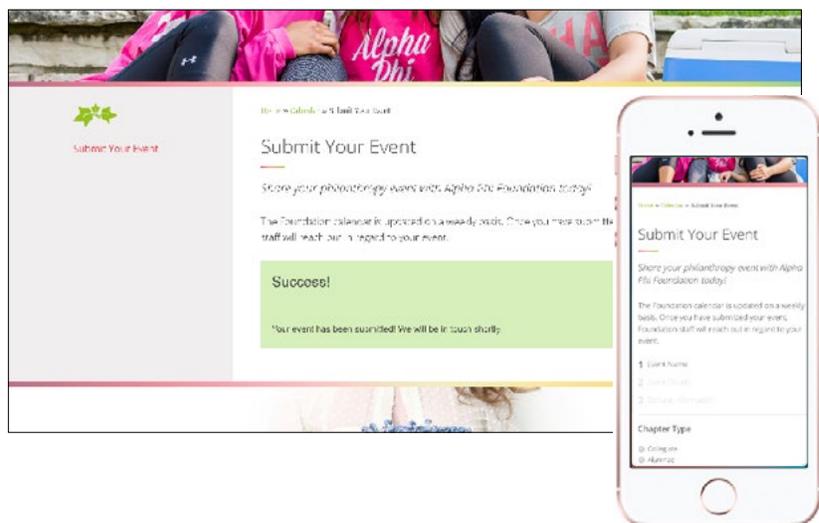
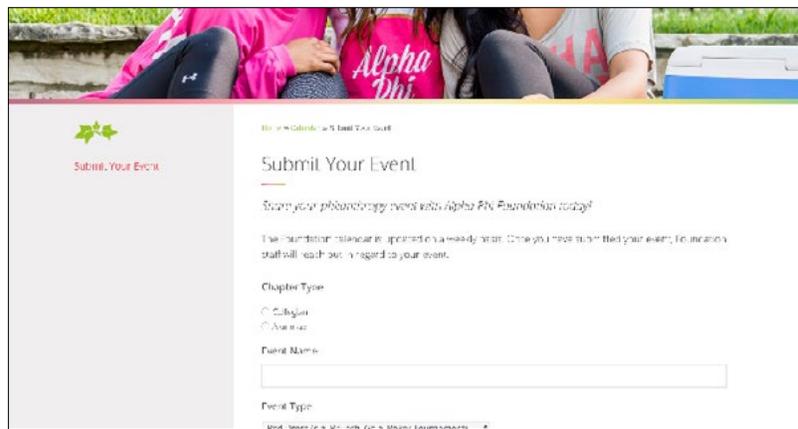
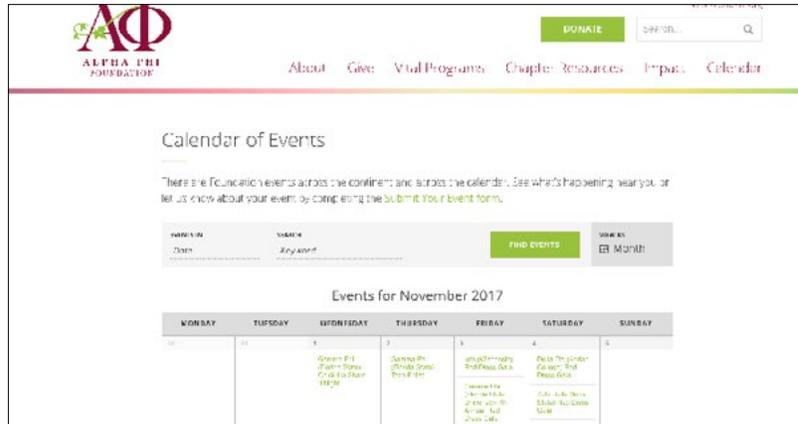
Your event will be added to the calendar and to the Foundation's social media schedule. Additionally, the event calendar is regularly shared with collegians, alumnae and friends of Alpha Phis.

Ask for Help!

You'll have the opportunity to ask for help and suggestions in event-planning and marketing. Whether you need help identifying an event speaker or need ideas to increase fundraising, this form is a great first step to starting the conversation with Foundation staff.

Get Event Reminders!

You will receive event reminders and tips in your inbox to help you along your way. Reminding you of deadlines and how to mail in donations!



www.alphaphifoundation.org/events

Building a Budget

Philanthropy budgets should be used to *front* costs—like putting down a deposit on a venue, paying for vendors up front before ticket sale revenue is realized, etc. Here are a few things to consider as you create an event budget:

Be realistic. Rule out venues and services that fall outside your budget. Expenses can accumulate quickly in event planning, and if something is already outside of the budget, don't waste your time considering it.

Shop Around. Check to see what items will incur the most costs from your list and start to research pricing. Gather quotes from multiple vendors to gain a better understanding of your purchased goods/service and costs.

Ask for in-kind donations. Use in-kind donations from individuals and local companies as a way to keep costs down. In-kind donations may be tax-deductible. (See *In-Kind Donations*)

Solicit Sponsorships. Use sponsorships to help offset your event expenses. Sponsorships are not tax-deductible contributions. (See *Sponsorships*)

Find the right ticket cost. After you have created a budget for your event, determine how much tickets should be. Factor in all of your event expenses (venue, catering services, meals, decorations, entertainment, printing/publicity, etc.). Keep in mind the economic level of your community as well.

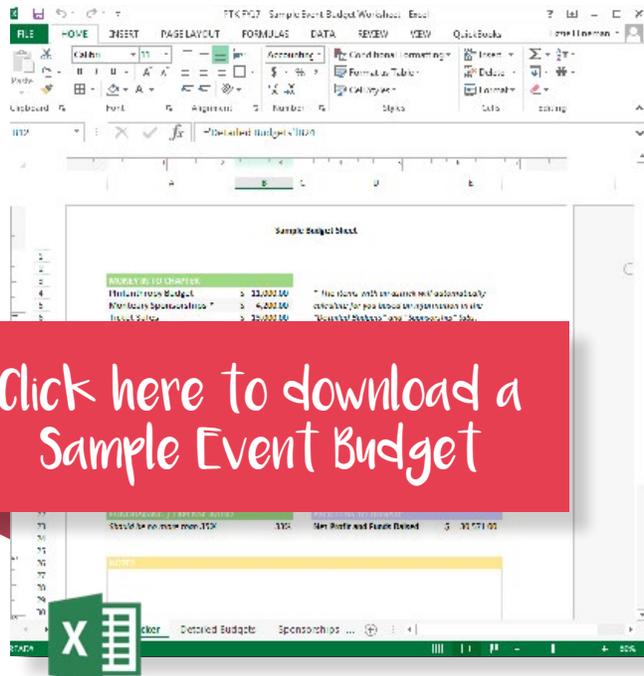
EXCEL SPREADSHEET RESOURCE

Sample Event Budget Worksheet

This resource is designed for you to maintain on your computer. You may use this resource to help keep track of your budget, in-kind donations, and sponsorships, if applicable. As you enter anticipated and actual expenses, the sheet will automatically calculate your total expenses.

Don't forget to re-name and save the spreadsheet to your computer once you've opened it. Keep in mind that this budget worksheet should be adapted to fit your chapter's needs.

[Download Now](#)



Ticket Sales

HOW TO Determine the Price of your Tickets

Let's say...you're hosting a Zumba-a-thon event! Take into consideration all of your event's costs and divide that by your goal attendance number:

Venue:	\$150
Instructor:	\$100
Water/Snacks:	\$250
A/V:	\$250
T-shirts:	\$1,200
Marketing:	\$200
Total	\$2,150

Goal Attendance: 150

$2,150 / 150 = 14.33333...$

To help cover the cost of your event, the registration fee should be around \$15 per person. If you have more than 150 people—fantastic, you're in the **green!**

If your venue has a capacity limit, be sure that you don't base your ticket cost on a number higher than the maximum capacity.

Ticket sales can make or break the event. **First and foremost, ticket sale revenue should be deposited back into your chapter's Billhighway account to help offset your event expenses.**

Please do not send ticket sale revenue to Alpha Phi Foundation. After your chapter has covered all event costs, your chapter may choose to send any net profits to Alpha Phi Foundation by cutting a check from Billhighway. (See *Sending in Donations*)

Tickets via Cash or Check

Cash. If your attendees are purchasing their tickets with cash, make sure to organize a cash box beforehand with *more than enough* change for the event. It's no fun having to run to make change while you have a line of people waiting to purchase their ticket!

Tip: Provide a Sign-In Sheet!

The downfall to collecting cash is that you aren't able to collect contact information as easily as you would if they purchased tickets via check or credit card. As attendees purchase their tickets, encourage them to sign in either on a piece of paper or electronically with their name and email address. After your event, send a thank you email sharing your gratitude and event success!

[Download Sign-In Sheet](#)

Check. If your attendees are purchasing their tickets with a personal check, ask them to make the check out to your chapter (e.g. "The Gamma Chapter of Alpha Phi Fraternity") with the event name in the MEMO field. As you collect checks for ticket sales from non-members, go ahead and deposit these funds into your BillHighway account to help offset your upfront event expenses.

Tickets via Credit Card

If your attendees are purchasing tickets using a credit card, you will need to use a third-party vendor to collect ticket sales. **The third-party vendor must be able**

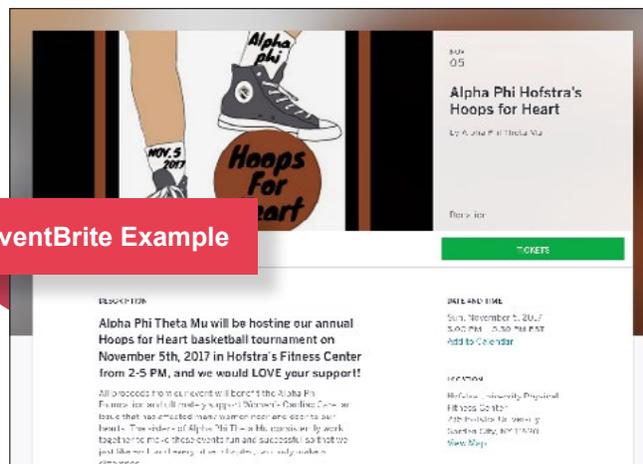
Ticket Sales

to cut your chapter a check for the money collected on behalf of the chapter. If a company is unable to cut a check, the chapter **cannot** use the company.

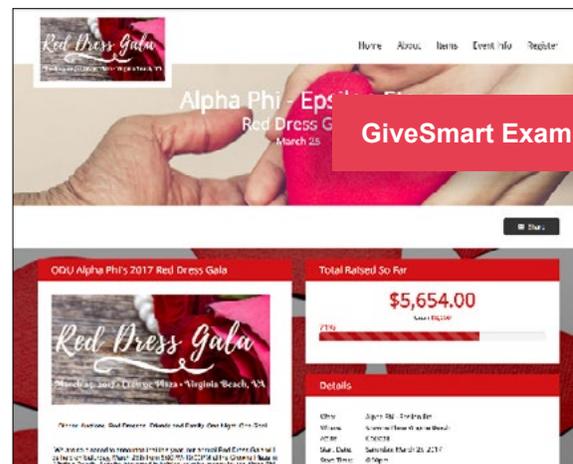
Chapters no longer have unique bank accounts and are, therefore, unable to provide companies with a valid bank account and routing number. The numbers on the bottom of your BillHighway checks are **not** unique to your chapter. If a company or app tries to deposit funds into BillHighway via ACH deposits (direct deposits), BillHighway will deny the deposit(s) and will charge the chapter \$25 per transaction attempt.

Below are a few examples of third-party vendors who can and will cut a check to the chapter leading up to and at the conclusion of your event.

EventBrite. If you choose to use EventBrite, be sure to choose a bi-weekly payout option. This option is not available on their website. You will need to call EventBrite and ask for this method of payment. EventBrite will cut your chapter a check for ticket sale revenue every two weeks, less 10% of the income collected in case of any charge-backs or refunds. After the event, EventBrite will cut a final check with any and all remaining funds.



EventBrite Example



GiveSmart Example

GiveSmart. If you choose to use GiveSmart, let an account representative know that you would like collected funds to be released prior to the event. For example, you may request that ticket sale revenue collected after one month, two months, etc. of selling tickets be released to the chapter before your event date. GiveSmart is able to cut separate checks for ticket sales (to the chapter) and for donations (to the Foundation) on your event site. Additionally, they will help you design a ticketing site—branded with your logo, colors and personalized URL. [Learn more about GiveSmart...](#)

BillHighway. If you choose to use BillHighway to collect ticket sales, it must be 100% clear to your attendees that their BillHighway transactions are not tax-deductible. In your

Ticket Sales

Billhighway portal an officier may create a link to collect fund by going to Others Tools > Collect Donations. The page will read "Collect Donations." This may confuse your attendees. Funds collected on Billhighway will go directly into your chapter's Billhighway account and therefore are not tax-deductible. Please make sure that your attendees understand they are purchasing tickets, *not* making a donation.

Other Ticketing Sites. New and innovative ticketing sites are coming out each year.* Chapters may explore using other event and ticketing platforms as long as the company is able to write the chapter a check for the funds collected.

That said, please do **NOT** use apps or websites such as:

- Venmo
- Greater Giving Payables
- Square Up
- PayPal

These sites and apps require chapters to provide a bank account and routing number in order to collect funds. As mentioned earlier, chapters no longer have unique bank accounts and are unable to provide companies with valid bank accounts and routing numbers.

Chapter may NOT use an officer or advisor's personal bank account to collect funds electronically either.

Frequently Asked Questions

Q: EventBrite is asking for taxpayer information. What do I do?

A: If you don't know your chapter's tax payer identification number (TIN), your Chapter Advisor or the Foundation staff should be able to provide it to you. EventBrite is required by U.S. tax laws to file a Form 1099-K for customers who are U.S. persons and have received more than \$20,000 in gross sales from Eventbrite and processed over 200 orders through Eventbrite for a calendar year. If you qualify for this, they will send you an email with a link to a W-9 form.

Q: Why should we ask for a bi-weekly payout option?

A: The chapter should use the ticket sale/entry fee revenue to pay for all event costs. A bi-weekly payout helps chapters make purchases and pay vendors in a timely manner prior to your event.

**If you have had success with at ticketing site that is not listed in the tool kit, feel free to share the site and your experience with the Foundation staff at chaptergiving@alphaphi.org.*

Sponsorship

Organizing a philanthropy event requires money and resources to manage all the details. To offset these costs, consider soliciting sponsorships.

What is a sponsorship?

A sponsorship is a cash or in-kind fee paid to your chapter in return for access to the commercial potential associated with your chapter, campus and/or event. The likely goal of being a sponsor would be to create a link in the minds of the target audiences between Alpha Phi and their own brand, product, or services.

What is the difference between a sponsorship and an in-kind donation?

A sponsorship is a business transaction. Event sponsors will receive something in return for their sponsorship—marketing, attendance, or full table with seated dinner, etc. Whereas an in-kind donation is the charitable giving of goods or services. The donor of an in-kind donation will receive no goods or services in return. (See *In-Kind Donations*)

Who should I ask for sponsorships?

Short answer—everyone and anyone. Sponsors come in all shapes and sizes. An event sponsor could be an individual, family or company who gives time, money or services to make your event a success. Their sponsorship may and should help subsidize your expenses.

When should I begin soliciting sponsorships?

The earlier, the better! It's best to reach out to sponsors no later than four months in advance. This will give you time to hear back and coordinate program ads or table displays, as needed. This will also help balance your budget as sponsors begin to commit at varying levels.

Are sponsorships tax-deductible?

Sponsorships are not tax-deductible contributions.

Alpha Phi Foundation is happy to provide chapters with the following tools and templates. These tools are intended to jump-start your sponsorship strategy and program.

Sponsors Request Letter Template

[Download now](#)

Sponsorship Levels

[Download now](#)

Sponsorship Agreement Form

[Download now](#)

Full Editable Sponsorship Packet

[Download now](#)

Template for Handwritten Note

[Download now](#)

Sponsorship

6 Tips for Asking for Business Donations or Sponsorships

The businesses in your community have the potential to become significant sources of support. A business may have various motivations for helping a charitable cause. Perhaps the owner has a personal interest in Alpha Phi and women's heart health or the business has made a commitment to improving the community in which it operates (and from which its customers are derived). Just as you can request cash or in-kind donations from individuals, you can request them of businesses as well!

#1: Start with a little background research on your target businesses

- In the downloadable [Sample Event Budget](#), use the "Sponsorship" tab to create and keep track of a master list of local businesses and potential sponsors. As they commit to a sponsorship, you'll be able to track sponsorship amounts, information and how your efforts are helping to offset your event costs!
 - First on your list should be any vendors or suppliers that you, your chapter or its members regularly use, work at or own. A connection to the business can make all the difference!
 - Solicit chapter and local alumnae for individual or business sponsorships. Maybe a local alumna owns a printing company and would be willing to sponsor some of the printing and signage of your event! (See *Engaging Alumnae & Your Community*)
- Work in teams and divvy up the names or types of businesses so that your chapter can make as many asks as possible! On the master list, carefully track all of your contacts and results from start to finish. Showing up at a business that got solicited by your fellow Alpha Phi only yesterday will not look professional!

#2: Think creatively about what you'll ask for or accept

- Understand your sponsorship levels and asks.
- If a business cannot commit to a sponsorship, be ready to share other ways for them to be involved and/or contribute to your cause (i.e. in-kind donations, monetary donations, volunteers).

#3: Prepare your written materials

- The [Full Editable Sponsorship Packet](#) is designed to assist you in drafting a letter to local businesses and individuals in your community to request support for your event. The words in red indicate text that needs to be changed to reflect your event and chapter.
- Have a printed flyer with more information about your event.

Sponsorship

- Prepare a sheet explaining the sponsorship levels and the types of recognition that can be expected for their donation.

#4: Send letters in advance

- Use the [Sponsor Request Letter Template](#) and send a letter prior to your in-person visits. This way you can ensure that you've said everything you want to without having to memorize a speech.
- Include a stamped, self-addressed envelope with an Agreement Form for your prospective donor to fill out and indicate what they plan to give and any other logistics.
- Slip a handwritten note into your sponsorship packet/materials. Use the [Template for Handwritten Note](#).

#5: Follow up with a personal request

- If you get no response within 10 days, plan to make a personal visit to the business.
- Research the name of the person who handles charitable donations or with whom you should speak, and (if able) schedule an appointment in advance.
- Once you've got the right person, mention any previous letters you have sent or contacts you've made and review the basic points in your letter. Highlight any special reasons they should choose your chapter for a donation.
- Be excited! When you convey excitement about your upcoming event, you're much more likely to get good results than desperate begging or attempts to "guilt" the business owner. If your organization or its key members are regular customers of that business, be sure to mention that.
- Hopefully, your visit will lead to an immediate "yes." But it could also lead to a "maybe," or "we'll think about it."
 - Don't give up—you may have to follow up multiple times with a business before your request makes it to the right person and that person feels ready to make a decision.
 - In any case, think of this as part of your chapter's relationship-building efforts. Even if this year's gift or sponsorship doesn't work out, you are laying the groundwork for a possible gift next year.

#6: Be specific about what you'll offer in return

- Offering publicity and recognition is your part in the win-win situation of a successful sponsorship. Be completely clear about how your chapter and event will publicly recognize the business's sponsorship or contribution.

Oh, and don't forget to send your sponsors and donors a post-event thank you! Make it personal and include photos and other materials. (See *Thank You's*)

Alcohol Policy & Event Planner Forms

For the full version of Alpha Phi International Fraternity's alcohol policies and procedures, please refer to the Alpha Phi Collegiate Chapter Operations Manual (CCOM), Appendix A: Standing Rules, Section 2: Alcoholic Beverages.

ALCOHOL POLICY

Alpha Phi International Fraternity strongly discourages any philanthropy event where alcohol is being served or is available.

Alcohol should not be a component of collegiate chapter philanthropic events. However, a cash bar is permissible at an event where a sizable portion of the audience consists of alumnae or parents of Alpha Phi members, even if the event is designed to raise funds or goods for a philanthropic effort.

Please remember:

- Alpha Phi chapter funds may **NOT** be used to purchase alcoholic beverages nor may anyone on behalf of a chapter coordinate the collection of any funds for such purchase.
- Alcoholic beverages may **NOT** be sold or served by Alpha Phis at Alpha Phi sponsored events
- Collegiate chapters shall **NOT** sponsor or co-sponsor any function with any distributor of alcoholic beverages or brewing company.
- With the exception of BYOB events, all alcoholic beverages made available at an Alpha Phi Sponsored Event must be served at a Cash Bar. Please review the Cash Bar requirements before taking action.

AT LEAST
2 WEEKS
AHEAD OF TIME

EVENT PLANNER FORMS

Alpha Phi International Fraternity requires that each and every event—philanthropic or not—hosted by an Alpha Phi chapter be reported to the Executive Office by submitting an Event Planner Form.

This form is separate from submitting your event to the Foundation and must be completed whether or not your event will have alcohol present.

If this form is not submitted, reviewed and approved within the correct time frame to the satisfaction of the VPRM, Executive Council and Chapter Advisor the event may be subject to cancellation.

Certificate of Insurance & Contracts

The officer responsible for planning the event should complete the Event Planner Form *at least* two weeks prior to the event to allow enough time for all of those eyes to see it!

[Go to your Officer Portal now...](#)

REQUESTING A CERTIFICATE OF INSURANCE

How do you get proof of your chapter's insurance coverage for a venue? How do you add the venue as an additional insured party? Don't sweat it! Here's how:

1. Log-in to www.alphaphi.org/members
2. Find the Risk Management Department page (Resources > Officer Resources > Risk Management...)
3. Under "Holmes Murphy Insurance" click the link reading *Request a Certificate of Insurance*.
4. An email addressed to Wendy, Alpha Phi's agent at Holmes Murphy Insurance, will automatically open. Contact the addressee to obtain a Certificate of Insurance.
5. A copy of the certificate will be sent to you and any other requested party.

If you prefer to talk to our agent over the phone, you may call Wendy at 402.898.5502

NOTE: The Executive Office is not able to provide these certificates. Please contact Holmes Murphy Insurance at least three weeks ahead of time.

HANDLING CONTRACTS

In the midst of event planning, you may need to sign a vendor agreement or contract. Please do **NOT** sign contracts without advisor approval.

A second set of eyes is needed to review all contracts for clauses such as cancellation deadlines, breach of agreement, gratuities, or food minimums. All contracts, prior to signing, should also be reviewed by Alpha Phi's insurance provider, Holmes Murphy.

Chapters could lose money if contracts aren't reviewed carefully. Better safe, than sorry!

AT LEAST
3 MONTH
AHEAD OF TIME

Collecting Donations

Below are five ways to collect donations at your philanthropy event. Not all events are the same, be sure to choose the right donations method for your chapter and event.

Option 1: Cash

You may collect cash donations at your event. However, be aware that when you collect cash donations, there is no easy way to keep track of your donors. If you hope to send thank you notes to individual donors, you will need to come up with a way to keep track of your individual donors.

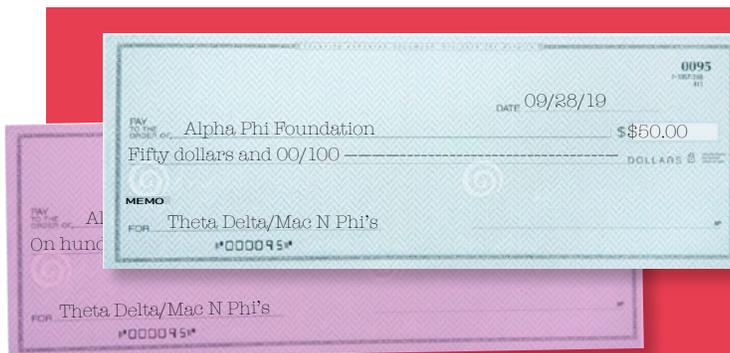
If you collect cash donations, please do **NOT** mail your cash to the Foundation. You must change it into a secure money order —aka MoneyGram or Cashier's Check—at a local bank or convenience store. [What is a money order?](#)

Option 2: Check

If your donors prefer to donate via check, please make all checks payable to Alpha Phi Foundation with your chapter name and event (e.g. Theta Delta/Mac N Phi's) in the Memo field. Please send each individual donor check from your event directly to the Foundation.

Please do **NOT** deposit all individual donor checks into your chapter Billhighway account to send a single check to the Foundation. If we do not receive the individual donor checks, the Foundation will not be able to credit the individual donor for their donation and the donor will not receive a tax receipt. Any funds from individual donors that are not directly deposited into the Foundation's account will not be tax-deductible.

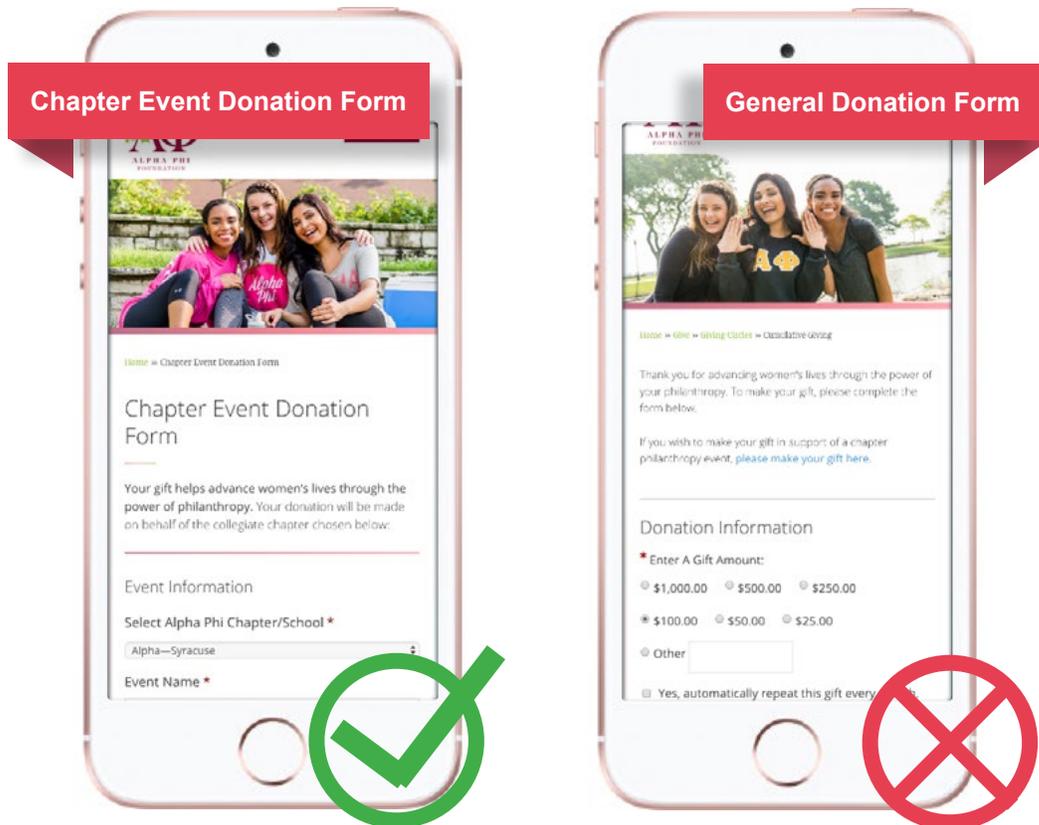
If you collect cash and check donations, it's important that you send your donations to the Foundation roughly within 30 days of your event. Please include all money orders and individual checks in a single envelope accompanied by a [Donation Cover Sheet](#). This cover sheet ensures that the Foundation knows what chapter and which event to credit the donations to.



Did you know?

Checks can expire. Some banks will refuse to deposit checks after 3-6 months it's dated. This is why it's important your cash & check donations are sent to the Foundation promptly after your event.

Collecting Donations



Option 3: Online Donations

We encourage our chapter to send out a donation link to their target audience encouraging them to make a donation on behalf on their chapter. Making an online donation is quick, easy and safe. The donation form you're looking for is:

www.alphaphifoundation.org/chapterdonations

You can share this link with your event attendees, chapter/local alumnae, on social media and with any other potential donors so that they are able to make convenient, online gifts before, during and after your event. Unfortunately, our chapters aren't able to track donations in real time yet. If you'd like to request a Chapter Giving Report (See Event Wrap-Up section) to view donations that have been realized, contact chaptergiving@alphaphi.org.

NOTE: If you send your audience to our general donation form (donate.alphaphifoundation.org), you chapter may NOT receive philanthropic credit for their

Collecting Donations

donation. There is no field for donors to indicate they are making a donation on behalf of your chapter or your event on our general donation form.

Upon a successful online transaction, donors will be emailed a transactional receipt for their gift. The site is adaptable to any desktop or mobile device with an Internet connection, making it a great option for collecting donation before, during and after your event.

If your donors make gifts through our website, we will keep lists of donor and gift information for your chapter. We will send these lists to you no later than one week after your event. Your chapter is responsible for writing and sending acknowledgments to these donors.

Option 4: In-Kind Donations

For any in-kind donation, chapters are responsible for writing and sending acknowledgments to donors. If the in-kind donation is valued at \$250 or more, donors may request a receipt from the Executive Office.

[Download In-Kind Gift Receipt](#)

What is an In-Kind Donation?

An in-kind donation, also referred to as gift in kind, is the charitable giving of goods and services rather than cash. In-kind donations are distinguished from gifts of cash.

Why make an in-kind donation?

Both cash and in-kind donations can provide a tax deduction for the donating company or individual. Sometimes, contributions of goods and services may enable a donating company to be more generous than it might have been otherwise.

Examples

Scenario A. The owner of Henry's Flower Shop decides to make an in-kind donation of 30 floral centerpieces to your chapter Red Dress Gala.

Scenario B. A local alumna owns a Pure Barre studio. You ask whether she'd be able to donate an item for your raffle. She agrees to make an in-kind donation to your raffle.

MobilePay Card Readers

Need More MobilePay Card Readers?

We recommend one card reader for every 100 attendees. That said, if your chapter needs more MobilePay Card Readers, please order additional card readers at least 2 weeks before your event.

[Order online or mail in an order form now.](#)

MobilePay Checklist

- MobilePay Card Reader(s)
- Log-in information Username/Password
- Reliable WIFI
- Mobile Device(s) smartphone/tablet
- Blackbaud MobilePay app, available in Apple App Store® or Google Play™ store
- Security Code for each device you plan

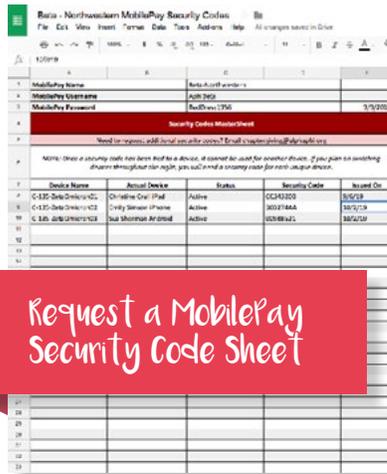
Blackbaud MobilePay Card Readers

Collecting credit card donations on-site makes giving to Alpha Phi Foundation quick and easy for your attendees. Each chapter was given a single MobilePay Card Reader from the Foundation at the 2016 Convention and we encourage all chapters to use them during all of their philanthropic efforts.

The funds collected using the MobilePay Card Readers should be 100% donations. All transactions will go directly into Alpha Phi Foundation’s bank account and will be tax-deductible.

Chapters should NOT use Venmo, Paypal, Square Up or any other outside mobile card reader to collect donations. The Foundation will not provide their bank account or routing number to chapters, and any individual gifts that are not directly deposited into the Foundation’s account will not be tax-deductible.

[How to Set Up Your MobilePay App and Reader](#)



GOOGLE SHEETS RESOURCE Requesting a New Security Code

Our Foundation staff will compile all of your chapter’s MobilePay log-in credentials into a Google Sheet for you to refer to and update. Don’t have the Google Sheet? [Request it now.](#)

Community Contributions Program

Apply Today!

Applications are reviewed by the Program Manager and Executive Director. After their review, they will contact the applicant to notify them whether their application has been approved or denied.

[Read the program policies & procedure and apply today!](#)

NOTE: Please do **NOT** market that your event supports Alpha Phi Foundation *and* [requested beneficiary] until you've been notified of your application.

Fund Disbursement

This is important!

Following your event, you must complete the Event Summary Form in order to request for disbursement of your Community Contribution Grant. Funds will not be disbursed until chapters do so.

[Complete the Event Summary Form](#)

Alpha Phi Foundation's Community Contribution Program allows Alpha Phi chapters to request a portion of their event proceeds go directly toward a program or cause that is especially meaningful to them.

When a chapter applies for the Community Contributions Program the application must be completed with an individual philanthropy event in mind at least 30 days before the event date.

Chapters may requested that a portion of their proceeds benefit either a:

1. Specific Foundation Program

The Foundation supports five vital program: Leadership, Scholarship, Women's Heart Health, Assistance Grants and Heritage. Has one of these programs directly affected your chapter's members? [Learn more on Foundation programs...](#)

2. Chapter-Specific Fund

If your chapter has a chapter-specific fund, such as a chapter-specific scholarship endowment, the chapter may request to designate a portion of the event proceeds to that fund. [View a list of scholarships funds...](#)

3. Local & Mission-Aligned Nonprofit

A chapter may request to support a local 501(c)(3) organization whose mission supports the research and education of women's heart health. This allows the chapters to create partnerships with valuable organizations while encouraging members to deepen their connection to philanthropy.

Event Summary Form & Sending in Donations



Event Summary Form

Chapters should complete the Event Summary Form after each of their philanthropy events that benefit Alpha Phi Foundation. This is an opportunity to share your chapter's successes, lessons learned and best practices with others.

1. Report on your event outcomes
2. Share your successes and challenges
3. Qualify for Foundation awards
4. If your event was pre-approved for a Community Contributions Grant, you must request for grant disbursement

Completing the Event Summary Form may take about 30 minutes.



CHECK & MONEY ORDER COVER SHEET

Please complete a separate form for each philanthropy event. Include all individual checks made out to the Foundation and convert all cash into a money order made payable to Alpha Phi Foundation.

DO NOT deposit all checks into your full/hybrid account and send a single check. Additionally, please DO NOT send cash via the parcel service.

Within 30 days of the event, please send all donations with a completed Check & Money Order Cover Sheet to:

Alpha Phi Foundation
ATTN: Chapter Giving
2550 Sherman Avenue
Evanston, IL 60201

Chapter: _____

Event Name: _____

Event Date: _____ Travel Date: _____

Total Number of Checks & Money Orders: _____

Total Amount of Checks & Money Orders: \$ _____

Contact Name: _____

Contact Email: _____ Phone #: +1 (____) _____ - _____

Signature: _____ Date Signed: _____

Additional Notes: _____

FOR FOUNDATION OFFICE USE ONLY:

Received by: _____ Initials: _____ Date: _____

Donation Cover Sheet

The Donation Cover sheet ensures that your chapter and event receive philanthropic credit for the funds received.

Best practice: Please mail in check and cash donations with a Donation Cover Sheet later than 30 days after your event.

Remember that you owe it to your donors to help them complete their donations in a timely manner so they can receive the necessary tax information and so that they'll continue to trust your chapter and Alpha Phi Foundation with their donations.

Questions or Concerns? Contact Lizzie Hineman

Manager of Chapter Giving & Communication

P: 847.316.8949

lhineman@alphaphi.org or chaptergiving@alphaphi.org

Alpha Phi Foundation

1930 Sherman Avenue, Evanston, IL 60201

P: 847.475.6820

www.alphaphifoundation.org