monarch school project

Education. Opportunity. Transformation.

# Community Fundraising Toolkit

## Monarch School

1625 Newton Ave San Diego, CA 92113
(619) 652-4100
www.monarchschools.org
Tax ID #33-0871354

# Community Fundraising

A Community Fundraiser is a fundraising activity by a non-affiliated group or individual who wishes to raise funds for Monarch School. At Monarch we are focused on ensuring that our students have access to quality learning opportunities and supportive services to improve their future success. Community support plays an essential role in enabling Monarch to serve all the learning needs of our students. Hosting a community fundraiser is a great way to help us further our mission of educating and supporting students experiencing homelessness.

**We are here to help you in the following ways:**

- Help you brainstorm event ideas
- Provide support, resources and helpful templates
- Coordinate approval of name and logo use for your promotions
- Issue tax receipts (if applicable; see section on Tax Receipting in this packet)

**However, there are some services we are not able to provide:**

- Guarantee attendance at events
- Apply for permits or licenses
- Provide event, volunteer and/or liability insurance
- Provide donor, sponsor, supporter or staff e-mail lists
- Provide financial support for event administration, including covering costs or managing the event budget

If you need further support in organizing your fundraiser or have questions please call Marketing and Communications Manager, Olga Guerena at (619) 947-5204 or oguerena@monarchschools.org

monarch school project

Education. Opportunity. Transformation.

# Helpful Tips & Planning

**1.Brainstorm for event ideas.**

**Examples:**

- Walk, Run, Bike, Dance, Swim, Bowl for Monarch
- Auctions/Silent Auctions
- Art Shows
- Benefit Concerts
- Birthday Parties
- Car Washes
- Garage & Yard Sales
- Bake Sale/Lemonade Stand
- Theme Parties
- Cash for Casual Dress Day
- Email and Facebook Campaigns
- Employee giving and company matching campaign
- Profit Sharing with local restaurants
- Host a Party with a Purpose
- Anything else you can think of!

**2.Set the date and location.**
Schedule your event for a day, time and location that provides you with plenty of time to plan and promote properly.

**3. Set fundraising goals and a budget.**
Remember, the lower your costs to produce the event, the higher your contribution will be.

**4. Submit a Community Fundraiser Agreement to Monarch School (attachment 1):**
Our staff will contact you to review any issues or concerns and will provide you with guidance and feedback on your proposed plan. Determine legal, insurance, liability, permit and safety issues you may need to address prior to submitting your form.

**5. Upon approval develop a publicity/promotion plan.**
Flyers, posters and other promotional materials will help generate awareness and excitement about your event. Your Monarch school contact will send you a promotions kit complete with a high res logo, stock photos and flier examples.

**6. Host the event!**
With proper planning, you can have a fun and successful event. Make sure to have our website handy for on-line contributions. Checks can be made out to: Monarch School Project. It is also a good idea to have our website displayed for your attendees for further questions monarchschools.org.

**7. Tell us how it went**

We'd love to see photos and hear stories as well as share in your success. We are also available for any follow-up needs such as tax receipts or donor communication. Please submit your proceeds within 30 days of the event.

monarch school project
Education. Opportunity. Transformation.

# FAQ's

**1.What can Monarch School do to support my fundraiser?**

Monarch School is here to support you in your fundraising efforts, however there are limited ways we can help. We can offer ideas for your event, collateral materials as well as an agency video. The fundraising event organizer is responsible for underwriting costs, printing materials, publicity and working at the event.

**2.Can Monarch School assist identifying potential sponsors or attendees for my fundraiser?**

Monarch School cannot source sponsors or attendees for your fundraising event. All marketing and outreach are responsibilities of the fundraising event organizer.

**3.Will a Monarch School staff member be able to attend my event?**

Due to the large demand for staff time, we cannot guarantee a staff members attendance. However, each event is considered on a case-by-case basis.

**4.Can I use the Monarch School name?**

Yes, when using Monarch School's name for your event you must state the fundraising event is benefiting Monarch School but is not affiliated. For example, " ... fundraiser benefiting Monarch School."

**5.Can I use the Monarch School logo to promote my event?**

Upon approval of your event, you may use the Monarch School logo in conjunction with your event. **If you use social media to promote your fundraiser please make sure to tag us @monarchschool.**

**6.Can Monarch School provide insurance for my event?**

Monarch School is the beneficiary and has no direct involvement with running the fundraiser, therefore, we cannot provide insurance for community fundraising events. The event organizer is responsible for obtaining insurance for the event.

**7.Can Monarch School assist in covering costs associated with my fundraiser?**

As the host of your community fundraiser, you are responsible for all expenses related to the fundraiser. Monarch is not able to provide funds or reimburse you for your expenses.

**8.Can I use the Monarch School tax exemption number?**

Since Monarch School is not hosting the event, it is considered a third-party fundraiser. For this reason, you will not be able to use your IRS 501(c)(3) charitable classification.

**9.Where will my donation go?**

Community support plays an essential role in enabling Monarch to serve all the learning needs of homeless students. Your donation will go directly towards our programs and services at Monarch, ensuring that our students have access to quality learning opportunities and support ive services to improve their future success.

**10.Where do I send the proceeds from my community fundraiser?**

Monarch School
Attn: Olga Guerena
1625 Newton Ave.
San Diego, CA 92113

monarch school project
Education. Opportunity. Transformation.

# Fundraising Guidelines (The Fine Print)

We appreciate your generosity and enthusiasm to organize a fundraiser to benefit Monarch School. We also appreciate that your fundraiser will require your time, energy and personal resources, which is why we ask you to review our Fundraising Guidelines listed below to understand your responsibilities and to ensure that your idea meets our fundraising criteria.

Community Fundraiser Application & Approval

- All events, activities and promotions must be aligned with Monarch School's mission, vision, values and privacy policy.
- A Community Fundraising Agreement (Attachment 1) must be completed and submitted to Monarch School to receive approval, promotional support, tax receipting approval and event recognition. Forms must be submitted at least two weeks prior to your event.

**Name & Logo for Promotional Purposes**

- Permission must be given by Monarch School to use its name/logo for the purpose of your fundraiser or promotion. All promotional material must be approved prior to distribution. A copy of our logo(s) will be provided via email upon acceptance of your Application Form.
- Use of our logo on promotional materials does not imply that the fundraiser is sponsored or cosponsored by Monarch School. Monarch is involved only as a beneficiary.

**Fundraising**

- Monarch School will not incur any costs or financial liability associated with third party events. The budget and its related expenses are the responsibility of the third-party orga - nizer.
- Taking commission, for any purpose, on funds raised as part of a third-party event is strictly prohibited.
- In order to avoid inadvertently jeopardizing existing relationships between Monarch School and its donors, sponsor agrees to receive approval from Monarch School before soliciting corporations, businesses, sports teams or individuals for cash or in-kind donations related to the event.

**Donations & Tax Receipting**

- Monarch School issues official income tax receipts in accordance with the guidelines set by the federal law. - Monarch School will not provide individual tax receipts for event-based fundraisers (E.g. dinners, golf tournaments, ticket sales, attendance fee, etc.). - Monarch School will only issue tax receipts for monetary donation made through the third-party fundraiser. The third-party organizer must maintain complete donor records on the Donation Tracking Sheet (Attachment 2) in order for a tax receipt to be issued. We will either mail or email receipts to the donors listed on the tracking sheet. - Event organizer agrees to provide Monarch School with all of the net proceeds from the event within thirty (30) days from the event. Monarch School may audit the event revenue and expenses if necessary.

**Licenses and Insurance**

- If you are organizing a raffle, draw or lottery in California please visit the State of Califor nia Department of Justice website (https://oag.ca.gov/charities/raffles) for more informa tion.
- Monarch School is not responsible for providing any type of liability insurance for your event, including volunteer and venue insurance. We are also not liable for any injuries sus tained by event volunteers or participants related to an event benefiting the Foundation. Event participants and organizers attending a fundraiser without the appropriate insurance are attending at their own discretion.

# monarch school project

Education. Opportunity. Transformation.

## Contact Information

Organization: _____ Name of Contact Person: _____ Title: _____ Address: _____ Email: _____ Phone: _____

## Event Information

Name of Event: _____ How many attendees do you expect:_____

Briefly describe the event: _____

Date of Event: _____ Time of Event: _____ Location: _____

How will you promote activity/event: _____

Will this be:

A one-time special event? YES _____ NO_____

An ongoing event or promotion? YES _____ NO_____

An annual fundraiser? YES _____ NO_____

Anticipated total revenue: $_____

What % or amount of the proceeds will Monarch receive: ☐ 100% Other_____%

Anticipated total donation to Monarch: $_____

Will another charity or nonprofit organization also benefit from this event?

YES _____ NO_____

## Terms and Conditions:

- ☐ I have read, understand and agree to the Community Fundraising Guidelines provided.
- ☐ I understand that Monarch School will incur no legal or financial liability for this event.
- ☐ I understand that Monarch School reserves the right to refuse approval, endorsement and the use of its name and logo in any event that does not meet its fundraising policies, charitable purpose and mission.

Proposed by:

_____

Signature of event sponsor

_____

Print Name

_____

Date _____

Proposed by:

_____

Signature of Monarch representative

_____

Print Name

_____

Date_____

**Please return this form via email to rvillarino@monarchschools.org**