

Fundraising Assistance Program General Information Sheet

Name _____
Address _____
Home Phone# _____ Work Phone # _____
Cell Phone # _____ e-mail _____

Name of Foundation _____
General amount of funds needed _____

1. Check off all that would describe your demographics.
 Suburb City Town
 Rural Community Primarily Upper Class
 Primarily Middle Class Primarily Lower Class
 Farming Industry Industrial/Manufacturing
 Large Corporations Small Merchants
 Tourist area
2. What is/are your target population(s)? Check off all that apply.
 Friends Family Church
 Co-workers Businesses Organizations
 Clubs Schools
3. What kind(s) of marketing do you have available? Check off all that apply.
 Local Newspaper Web page Local Magazine
 Stores willing to put up ads Community bulletins/flyers
 Sport event programs Hotel flyers/brochures
4. Do you have any of the following available to you?
 Computer Internet access e-mail
5. What kinds of fundraising activities are you interested in? Check off all that apply.
 garage sale raffle silent auction
 car wash church or community dinner bake sale
 sporting event (marathon, walk-a-thon, bike-a-thon)
 letters of appeal to friends, family, church, community, co-workers, etc.
 website advertising mini-fair or craft show
 merchant donation of a portion of profits
6. What types of marketing strategies interest you? Check off all that apply.
 flyers brochures invitations letters of appeal
 newspaper ad or article bulletins magazine ad or article
 e-mails web page
7. What do you see as your strengths? Check all that apply.
 computer skills personality writing skills
 organizational skills people person family support
 affluent in your community ambition time management
8. What do you see as your limitations?

9. In the next six months how would you describe your ideal fund raising campaign to hit your target?

10. After you have reached your fundraising goals would you be willing to be a reference?
 Yes No

National Heritage Foundation Rules, Regulations, and Policies of Fundraising

Policy for Raffles, Lotteries, & Auctions

Raffles are a popular and relatively easy way to raise funds for charitable activities, but there are some rules and regulations that a Foundation at NHF must be careful to follow:

- Any Foundation that wants to conduct a raffle, auction or lottery **must** have NHF approval before proceeding in any way. Write your proposal and submit this to our main office. Include a completed **Auction & Raffle Approval Form** (found on the NHF website).
- We will want to know:
 - what will be raffled
 - what it will cost
 - how much each ticket will cost
 - where the money for the “up front costs” will come from
 - in which state will the raffle be held (there are different regulations in each state)
- When you hold an approved auction or raffle, you must keep a detailed list of the items donated by businesses or individuals, and send a copy of this list to NHF. If the value of a donated gift exceeds \$5,000, the donor may provide you with Form 8283, which should be sent to NHF immediately. Do not sign Form 8283. Only approved officers of NHF are permitted to sign Form 8283 to acknowledge the gift. If the donated property's value exceeds \$5,000, NHF signed IRS Form 8283 in connection with such donation, and the property was disposed of through auction, raffle, or otherwise within two years of the donation, NHF must file IRS Form 8282, Donee Information Return. All property in a raffle **must** be contributed to NHF before the actual raffle event.
- NHF will not pay any expenses from these moneys until it is certain that sufficient funds have been raised at least for the payment of the promised prize if the prize will be bought. If the raffle fails, we would return the raffle money to the purchasers.
- The value of the raffle prize is taxable income to the winner. Before the prize is presented to the winner, we must have the name, address, and social security number of the winner so that we can furnish a Form 1099 to both the winner and the IRS in January of the following year.
- If a participant wins more than \$600 in cash, NHF will file Form 1099-MISC with the IRS and mail a copy to the winner. Therefore, we must have the name, address, and social security number of the winner so that we can furnish a Form 1099 to both the winner and the IRS in January of the following year. For cash prizes to one individual of \$5,000 or more, NHF will withhold 28% of the winnings. If the prize is a noncash item worth \$5,000 or more, NHF will collect the required withholding amount of 28% from the winner. NHF reports these withholdings on IRS Form 945, Annual Return of Withheld Income Tax.
- Donors have their own filing requirements. For donated property with a value that exceeds \$500, the donor must file IRS Form 8283, Non-Cash Charitable Contributions. The donor is responsible for valuing the property donated to your Foundation at NHF. If an individual donates self-created arts or crafts for an auction or raffle, he or she may deduct only the cost of the materials used in the art or craft item, not the price at which the item sells.
- Federal law prohibits the mailing of lottery tickets in interstate commerce and prohibits using the mail to transfer money or other consideration in interstate commerce.

- While federal law permits non-profit organizations to use the U.S. mail to advertise or provide other information concerning a raffle that may be conducted legally in a state where the raffle is to be held, states are free to restrict or prohibit advertising of a raffle under state law. Therefore, the law of the state where the raffle is to be conducted must be consulted to determine whether advertising of the raffle is legal. Also, you must obtain all necessary licenses, permits, etc. that may be required by a particular state (or the county or other locality as applicable) where the raffle is to be conducted.
- When someone purchases a raffle ticket, it is **not** a charitable donation because their intent is to win a prize. Therefore, no receipts are necessary.

Corporate Matching Gifts

Have you ever thought about asking your company for a matching gift to your Foundation at NHF? Remember, since your Foundation is under the National Heritage Foundation, it qualifies as a 501(c)(3) nonprofit organization. Corporations will often match gifts made by employees, officers, directors, and in some cases spouses and/or retired employees, officers, or directors. More than 1,000 American companies have adopted corporate matching gift plans to help support nonprofit organizations. Consult your company's personnel or community relations department for guidelines. It's a great way to add some funds to your Foundation at NHF.