



Checklist for Holding an Event

Chapters serve as the fundraising and community building entity for your respective schools, often hosting events such as Fun Run, annual auctions, carnivals, etc. As a Chapter, you are required to adhere to the policies required by the Foundation. This is a check list to help you know what is expected and to support your event success. If in doubt, reach out and we'll walk you through it.

Be sure to:

- Prepare a detailed budget including Income and Expenses by Event (should have been part of the annual budget submitted at the beginning of the year to the Foundation). Update your budget regularly and report financials intermittently at officer meetings. Remember that Chapters must follow purchasing guidelines. If the items will be owned by the school (e.g. equipment, sports uniforms), funds must be granted to the school and purchased by them. See chapter manual for more details.
- Make sure all activities are acceptable (see *Permissible Activities*).
- Check with Foundation for vendors to see if a W-9 is on hand, if not you will need to get one.
- Determine whether you'll need to collect credit card payments. Some vendors, like Boosterthon and Greater Giving will collect them for you. If you'll be processing credit cards directly make sure you are set up for Square Credit Cards through the Foundation.
- All marketing/promotional materials must list your chapter as: "[Chapter Name], a Chapter of the Foundation for Douglas County Schools" and include our logo.
- Submit a description of the event in writing and request Liability Insurance from the Foundation at least two weeks prior to the event.
- Read your contracts! Make sure you know what you are signing.
- Know the difference between a **contribution** and **non-tax deductible earned income**. Be sure to issue acknowledgements for contributions. Income that involves a fee paid for a good or service is not tax deductible.

Non-permissible Activities

Make sure all activities for your event are within insurance coverage.

While Chapters are included in the basic coverage, some activities are not covered. Cost of additional insurance can be high and must be covered by the Chapter.

- Animals (other than house pets)
- Carnivals with mechanical rides
- Aircraft and Motorcycles runs and automobile rallies
- Rodeos sponsored by the Insured
- Any event more than 500 people at any one time
- Plus more... check with the Foundation

Make sure all activities for your event are compliant to DCSD and Foundation policies.

Events may never include the following:

- Political Rallies
- Firearms
- Alcohol on school properties (even as a Silent Auction item) or where students are present
- Events including contact sports
- Fireworks
- Raffles/Gaming (we do not hold a license)

Financial Considerations

- Administer the Dual-Control process when reconciling deposits for the event and follow the usual Pay Voucher process.
- Chapters must provide receipts for financial and in-kind donations over \$250, how it is a best practice to issue receipts for all contributions.

For complete information please refer to the Chapter Policy Manual.