St. Joseph Academy

Department: Philanthropy (Resource Development)
Number: 410.4
Effective Date: 10/15/19
Review Date: 3/16/2025
Revised Date: 3/16/2025

I. Policy: This document provides the framework to ensure your event is carried out appropriately and safely. Please read the following guidelines before completing and submitting the attached application form. All events require approval from SJA and must comply with all federal and provincial laws.

II. Procedures:

Promotion and Logo Usage

A. SJA will provide its logo upon approval of the event. Organizers will be provided with an event package that includes sample media releases, promotional materials, information about SJA, and guidelines for logo usage.

B. All promotional materials must be designed and printed or posted to the web by the third party organizers. In naming the event or promotion, SJA must not be used in the title, but should be listed as the beneficiary of the event. For example, organizers may not refer to the event as the "St. Joseph Academy Bowl---A---Thon" but it could be promoted as "Bowl---A---Thon in support of St. Joseph Academy."

C. SJA may promote the event, where appropriate, through our website, e-mail, social media or newsletter.

Sponsorship

SJA cannot solicit sponsors for your fundraising event and does not provide any donor contact information.

Financial Guidelines

Third party fundraisers are responsible for paying all fundraising expenses related to their activity. It is recommended that event expenses should be 30% or less of the total amount raised, excluding any in-kind donations. No bank accounts in the name of SJA should be set up. SJA cannot process any credit cards for your event.

Any promotion that donates a portion of its sales must state clearly how much, in percentage or dollar amounts, that will go to St. Joseph Academy.

Some fundraising activities, such as raffles, that involve selling to the general public, may need a license. Check with your local or municipal governments.

SJA does not approve individuals soliciting funds door-to-door or by telemarketing.

All checks should be made payable to SJA and sent to SJA within 30 days of the event. Please remit all checks to: St. Joseph Academy 1600 W. Oklahoma Ave Milwaukee, WI 53215 ATTN: Resource Development Office.

Donations made in cash or by check (made payable to St. Joseph Academy) are eligible for charitable gift receipts. If receipts are requested, the names, addresses, postal codes, phone numbers and amounts of donations must be recorded and turned in with the donations. Note that an individual may not receive a gift receipt for money that was not donated by them (i.e. an individual cannot receive a receipt for monies raised at an event).

Non Profit EIN # 39-0806262

Cancellation, Liability and Changes

SJA endorses fundraising events that respect the positive image of our organization and complement our mission. We reserve the right to deny or withdraw approval of an event if there are serious concerns about the impact on our organization's image.

By submitting your fundraising idea, you agree to assume all risks and liabilities associated with the proposal and hereby release and hold harmless St. Joseph Academy, its directors, officers, employees, agents and successors from and against any and all claims, damages, liabilities, costs and expenses, arising out of or may occur in conjunction with the proposal. By receiving information on your fundraising idea, SJA is not obligated to enter into a fundraising program with you.

You must advise SJA of any changes in your fundraising event. If circumstances warrant, SJA reserves the right at any time to ask you to cancel a fundraising event or remove our name from your event. If an event is cancelled, you agree to release SJA from any and all liability in connection with such action.

Thank you. No matter how big or how small, your efforts will make a contribution to our organization. For further information please contact the Resource Development Department at (414) 645-5337 ext. 247.

Approved by: Tabat Mc [illegible] Date 3/20/25

(President/CEO)

Third Party Event Application Form

Contact Information

Applicant/ Organization Name: _____

Address: _____

City, State Zip: _____

Phone: _____

Email: _____

Event/Promotion Information

Event Name: _____

Event Date: _____ Event Time: _____

Event Location: _____

Briefly describe the proposed event or promotion. Please attach additional sheet or information if required.

_____

_____

Budget Information

Projected Revenue: _____ Projected Expenses: _____ Projected Net Revenue: _____

Projected Donation to SJA ($ or %): _____

Signature: _____ Date: _____

As the potential third party fundraising event or promotion organizer, I have read and understand the above policy and assure the St. Joseph Academy name will be properly used funds will be handled and accounted for in a responsible manner, fundraising will be conducted in a method that is consistent with the image of SJA and that those associated with the event or promotion will act in accordance with all municipal, provincial and federal laws. I understand that at any time St. Joseph Academy can withdraw its permission if it feels its reputation is at risk or any other liability or challenge arises.

Keep a copy of the policy and completed application for your records. Return a signed original to St. Joseph Academy: 1600 W. Oklahoma Ave, Milwaukee, WI 53215 (414) 645-5337 ext. 247 or kschubring@sjamilwaukee.org.

For SJA Office Use Only:

Application: Approved or Denied Date: _____

Signature of President & CEO: _____

Applicant notified by: Email Phone Mail Date: _____