



# Partners In Development, Inc.

*Serving the poorest of the poor since 1990*

## **Third-Party Fundraising Guidelines**

Thank you for your interest in fundraising to benefit Partners In Development, Inc. (PID)

We appreciate your willingness to make a contribution.

We ask that you adhere to the following guidelines as you raise funds:

1. Plan, organize, staff, execute, and promote event/fundraising at no cost to PID.
2. Ensure that your event/fundraising efforts fit the mission and image of Partners In Development, Inc., and that all efforts are done in a respectful and professional manner, as well as in compliance with all federal, state, and local laws.
  - This may include obtaining any necessary permits and/or licenses required by law for event/fundraising.
  - Items sold at your event are not tax-deductible.
  - Do not solicit funds door-to-door or using telemarketing methods.
3. In order for donations to be tax-deductible, they must be payable to PID and come through our office. Please provide donors with the attached sheet, "Information for Donors."
4. All funds raised must be used for a designated PID project (may include trip fees & airfare). Personal use of funds is not allowed. Any additional funding raised over the original goal will go towards the programs/projects of PID and not to the individual(s) raising the funds.
  - \*If you are attending a service trip and pay trip costs, and funds are raised to cover the cost of the trip and airfare, refunds are available only including the base cost of the trip and airfare, and only if funds are in before the trip date. All other trip-related expenses are the responsibility of the trip participant.
5. If collecting funds, keep accurate records to track and submit donations. Donors may also send contributions directly to PID's office or donate online at **www.pidonline.org**
  - Please instruct donors to indicate the project & country funds are designated for (e.g., trip fees, housing, medical, etc.) in the memo line.
6. Deliver monies raised for PID within 30 days of the event/fundraising.

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### **Partners In Development, Inc.**

55 Market Street, Suite 201, Ipswich, MA 01938

(978) 380-6132 office • (978) 380-6115 fax • info@pidonline.org • www.pidonline.org



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## **What Partners In Development, Inc. may provide:**

1. A letter of authorization to validate the event/fundraising effort.
2. Promotional material including brochures, newsletters, etc. when available, but does not purchase advertising to promote third-party events. We may however promote event on website/blog/Facebook at our discretion.
3. Use of PID's name and logo upon review and approval of event/fundraising.
4. Based on availability, staff attendance at the event to speak and/or receive proceeds.
5. Charitable Giving Tax Receipts to donors who give payable to PID.

## **Partners In Development, Inc. does not:**

1. Share private information.
2. Obtain any third-party licenses or liability insurance on behalf of third-party fundraisers.
3. Assume legal liability or financial liability associated with this event/fundraising effort.
4. Allow use of PID online forums (i.e. Facebook, Blog, Website) without prior consent.

***\*Partners In Development, Inc. reserves the right to decline any fundraising proposal.***

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## **Third-Party Fundraising Application**

### **Host Information**

Name of Individual(s)/Group/Organization:

Address:

Contact Person:

Title:

Phone Number:

E-mail:

### **Event Information**

Event Name & Brief Description:

Date & Time of Event:

Location & Address:

Number of Estimated Attendees:

Target Market (e.g. general public, customers, family/friends):

Frequency of Event:

Is this the first year of your event?

If no, please briefly describe previous events/fundraising:

Will proceeds be donated exclusively to PID?

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If no, please list the other charities/organizations that will benefit and how the proceeds will be divided:

How will the event be publicized?

How will funds be raised?

Promotional Materials Requested from PID (e.g. brochures, newsletters):

Would you like your event listed on PID's website and/or publications?

Applicant's Printed Name: \_\_\_\_\_

Applicant's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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**PID OFFICE USE ONLY:**

Event Approved: \_\_\_\_\_ Authorized PID Staff: \_\_\_\_\_

Event Denied: \_\_\_\_\_ Date: \_\_\_\_\_

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## IMPORTANT INFORMATION FOR OUR DONORS

Partners in Development is a recognized 501c(3) tax-exempt organization. Maintaining our exempt status is very important, so we make every effort to follow IRS rules and regulations carefully. Many of those rules affect our donors and the donations we receive. The following is information that donors should understand regarding their donations.

### DEDUCTIBILITY OF DONATIONS

Because PID is a 501c(3) organization, donations to PID generally qualify as tax-deductible charitable contributions. Donations to PID's general fund and programs are fully deductible. However, certain types of donations and payments we receive are not:

#### Limited Deduction Allowed

If a donor receives something of value in exchange for a donation, only the portion of the donation that exceeds the fair market value of what was received is deductible. For example, the winner of an auction item at our Annual Benefit can only deduct the amount by which their winning bid exceeds the item's fair market value as stated in the auction program. Similarly, Annual Benefit sponsorships and ticket purchases must be reduced by the estimated fair market value of the tickets received in order to calculate the deductible portion.

#### No Deduction Allowed

The following are not deductible and are not included in the donor's year-end tax receipt:

The purchase of jewelry, crafts or cards.

The purchase of raffle tickets at the Annual Benefit.

Gifts, either monetary or physical, to be delivered to a sponsor child or their families. (See "Earmarked Donations" below.)

#### Earmarked Donations

According to the IRS, donations "earmarked" or designated for the benefit of a specific individual are not deductible. The donor may express a preference as to how the donation is to be used, but if their intent is to benefit only the specified individual, or if the charity does not have full control over the use of the funds, then it's considered a gift to the individual and not a tax-deductible donation to the charity. This rule has bearing on two types of donations that PID receives:

Child sponsorships: As stated above, gifts given to PID to be passed directly through to a sponsor child are not deductible. However, regular child sponsorship payments are fully deductible, because they are donations to PID's on-going child sponsorship program. PID has full control over how those funds are used to carry out that program.

Trip fees: It's very important for trip participants and donors to understand that, in order for them to be deductible, donations to a trip must ultimately be donations to PID, not to the trip participant. Although the donor may express a preference for a specific trip participant, PID has full discretion and control over use of the funds. Trip donations raised in excess of trip costs can not be returned either to the trip participant or the donor, but are applied to PID's projects and programs. When soliciting donations, trip participants must make this clear to donors. All trip donations are accepted based on these terms.

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## **TAX RECEIPTS**

### **Financial Donations**

We send tax receipts annually in January for donations made the prior year. Donations must be postmarked by December 31<sup>st</sup> to count towards that year. Donors whose total financial contributions equal \$100 or more will receive a receipt summarizing their donations for the year. If at any other time you need a receipt, however, please contact the office.

### **Donations of Goods (Gifts-in-Kind)**

We welcome donations of needed supplies, but before donating, please check our website to find out if we are able to use the items you have. Gift-in-kind donations are not included on the annual financial donations receipt; instead, you may request a receipt by filling out a Gift-In-Kind Donation form (available on our website or from the office) and returning it to us with the donation. We'll return the acknowledged form to you, which you should keep with your tax records.

## **VOLUNTEER OUT-OF-POCKET EXPENSES**

Some out-of-pocket expenses, including travel expenses, incurred while volunteering for PID may be deductible. The expenses must be unreimbursed and you must have adequate records to document the expenses. In some circumstances the IRS requires the volunteer to obtain an acknowledgement from the charity that verifies their volunteer service. If you would like to receive an acknowledgement of service, please contact the office.

## **TAX GUIDANCE**

We've provided this information to help our donors understand some of the issues related to donating to PID, however, we cannot give tax advice. For more information, please see IRS Publication 526, *Charitable Contributions*, which is available at the IRS website. We also recommend that all donors consult a tax professional regarding the deductibility of their donations. Each donor is different, and the deductibility of a specific donation depends upon many factors related to the donor's tax situation.

*Thank you for considering supporting the work of PID!*

*To learn more, visit [www.pidonline.org](http://www.pidonline.org)*

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