



SPECIAL EVENT GUIDELINES

**Third-Party Event Benefiting
Southern Museum of Music®**

Version: SMOM160225



Third-Party Event Guidelines & Procedures

Thank you for your interest in holding a special event to benefit Southern Museum of Music®. We appreciate your desire to help preserve the history and influence of Southern music world-wide. This packet will help you structure a successful third-party event or fund-raiser within Southern Museum of Music policies. The Executive Board of Directors must receive and approve your Third-Party Fundraising Application before you can begin to use our name or raise money on our behalf.

Southern Museum of Music® (the “organization”) as a non-profit organization certified tax-exempt under sections 501(c)(3) of the United States Internal Revenue Service code, is held to the highest legal and ethical standards of fundraising and we are governed by policies established by our Executive Board of Directors, Southern Museum of Music inc. We also adhere to the principles of various watchdog agencies, including the Better Business Bureau (BBB) and Wise Giving Alliance, which you are required to follow if you want to use the Southern Museum of Music name or logo.

In completing your Third-Party Fundraising Application and planning your third-party event, concert or fund-raiser to benefit the Southern Museum of Music, or its associated educational programs, there are some rules that you are required to follow. Please review the following information carefully.

- **01.** Southern Museum of Music has the right to reject any event solely at its own discretion.
- **02.** The third-party organizers of the event will be solely responsible for all costs, expenses and taxes associated with it. Southern Museum of Music will not cover any costs for an event.
- **03. THE MINIMUM FUND-RAISING GUARANTEE;**
\$5,000 NET is requested for any use of the Southern Museum of Music® logo and name.
\$2,000 NET gives use of the Southern Museum of Music® name only. (Example: “Proceeds / A portion of the proceeds from this event will benefit Southern Museum of Music®”). This statement can be used in promotional materials, website, fliers, posters, etc.
- **04. GUARANTEE DEPOSIT;**
\$2,000 is required upon approval of Application by the Executive Board and prior advertising of the planned event. The deposit shall be credited against agreed Net income. Balance of agreed percentage (%) to be given or guaranteed donation is due within 30 days of completed event.
- **05.** The third-party agrees to comply with all laws relating to the promotion and conduct of the event, and to file all appropriate registrations, obtain all permits, releases, consents, licenses and approvals, necessary or desirable for promoting and conducting the event.
- **06.** Organizers must request permission to use Southern Museum of Music’s logo and obtain a Logo Authorization before using it in any way. Organizers must also seek and obtain approval from Southern Museum of Music’s Executive Board of Directors before printing and/or distributing any invitations, event sign-age, publications and promotional materials that make reference to the organization.
All references to Southern Museum of Music should say:
 - a). Southern Museum of Music (first reference)
 - b). Southern Museum of Music (subsequent references)
- **07.** The third-party assumes as its sole responsibility any and all liability which may be incurred due to, arising out of, or on account of the event, and agrees to indemnify and hold Southern Museum of Music harmless for any and all such liability incurred.



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- **08.** Depending on the exact nature of the event, the third party might be asked to provide a certificate of insurance for the event naming Southern Museum of Music as an additional named insured.
- **09.** The third-party is considered to be an independent contractor and has no authority to enter into contracts on behalf of Southern Museum of Music.
- **10.** Organizers must inform Southern Museum of Music of any effort to recruit financial underwriters or sponsors in order to ensure there is no duplication of underwriting efforts.
- **11.** Unless otherwise agreed to in writing, Southern Museum of Music does not provide administrative and promotional support for third-party events.
- **12.** Southern Museum of Music does not share the contact information of our donors, volunteers, or collected database with third-party event organizers.
- **13.** Unless otherwise agreed to in writing, organizers may not offer event underwriters, sponsors and donors the option of writing their checks to Southern Museum of Music for tax purposes.
All checks need to be made payable to the third-party that is organizing the event.
- **14.** The third-party agrees to provide Southern Museum of Music with a full accounting of all monies received as a result of the event, and to pay all proceeds due to Southern Museum of Music within fourteen days of the event. If possible, Southern Museum of Music would also like to receive a list of the event's underwriters, sponsors and donors so we can recognize them for their support.

Organizer Responsibilities

You, the event organizer, are responsible for planning and obtaining support for your fund-raiser from inception to the day the check or donation is issued to Southern Museum of Music. ***It is your job to develop logistics and acquire the venue, sponsors, publicity, prizes, entertainment and staff that are necessary for a successful event, including its fundraising aspects.***

Your efforts must draw the majority of participants. We look forward to answering your questions and providing support where we can.

Approval Process

Please fill out and return the Third-Party Event Proposal and License Application to the Executive Board of Directors as soon as possible for approval. Your submission will be reviewed within 14 business days. We will call you with any questions and help revise any areas that are not in compliance with our standards.

We promise to make this process move quickly and we will provide a response within 17 business days of receiving the application. You are not permitted to use the Southern Museum of Music name or logo for **ANY** reason until we have provided you with written approval of your Third-Party Event Proposal and License Application and our office receives any required Guarantee Deposits.



Third-Party Event Guidelines & Procedures

Using the Southern Museum of Music® Logo and Name

A copy of the Southern Museum of Music logo will be sent to you upon request pending approval of the Application and receipt of any required Guarantee Deposit. Some rules for using the logo:

- ❖ Our logo appears at the top of each page. It was developed especially for Southern Museum of Music and must be used as it appears.
- ❖ Do not use logos found on the Internet. We will provide you with the most current version, or supply an event specific from our design team.
- ❖ The name of the Southern Museum of Music, only in bold, may be used in Futura, Century Schoolbook or Century Gothic (online).
- ❖ The logo and name must never be used in the title of the event.
- ❖ Any products and/or collateral you develop for your fund-raiser which incorporate the Southern Museum of Music logo or name (such as t-shirts) must be approved by the Southern Museum of Music Board of Directors.
- ❖ In all cases, the words "Southern," "Museum," and "Music" must all be capitalized and separated.
- ❖ The registered trademark symbol (®) should always be used on the first or most prominent reference of each registered trademark (e.g., in a headline, or when the marks first appear in a body of text).
The circle-R symbol should appear in superscript at the end of each mark (e.g., Southern Museum of Music® or Southern Museum of Music® Atlanta – **not** Southern Museum of Music).

Any information you distribute, publish or send out using the Southern Museum of Music name or logo must be reviewed and approved by the Board of Directors prior to such distribution. Before publishing, please send an electronic copy of all materials to the Southern Museum of Music's Board of Directors to receive written approval in advance.

Sharing the Southern Museum of Music Message

If you would like help wording an appeal to your event supporters, we would be happy to assist you in developing compelling language that reflects our mission. Please communicate this important information to everyone involved in promoting your event, and remember that all messaging and materials need the Southern Museum of Music's prior written approval before being used and/or distributed.

Disclosing Your Donation

The BBB Wise Giving Alliance requires specific disclosure language for indication how your fund-raiser is benefiting the Southern Museum of Music. Please include this language in all publicity that mentions Southern Museum of Music. You must clearly disclose how the Southern Museum of Music benefits from the sale of products or services (i.e. cause-related marketing) when you state or imply that a charity will benefit from a transaction. Such promotions should disclose, at the point of solicitation:



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- ❖ The actual or anticipated portion of the purchase price that will benefit the Southern Museum of Music (e.g. 5 dollars of every concert ticket will be donated to Southern Museum of Music).
- ❖ The duration and event details of the campaign.
- ❖ Any maximum or guaranteed minimum contribution amount (e.g. up to a maximum of \$200,000).

Third-Party Fundraising for Southern Museum of Music

Unacceptable Methods of Fundraising

Southern Museum of Music policies prohibit our chapter and any of our external fund-raisers from employing the following types of fundraising tactics:

- ❖ Telemarketing
- ❖ Door-to-door solicitations
- ❖ Most online donations not directly associated with Southern Museum of Music's official on-line program
- ❖ The Southern Museum of Music also reserves the right to choose not to affiliate with any event where fundraising methods do not complement the organization's mission.

Raffles

Many of our southern state locations have specific laws about raffles, and in many cases, raffles are illegal without a license or a permit. Southern Museum of Music will not apply for a raffle license on behalf of third party events.

Please always follow all raffle regulations for your governmental area.

Sponsorships

If you are planning to go to companies or organizations to get donations or sponsors for your event, please provide us with a detailed list of which you plan to approach prior to approaching them, because we may already have an established relationship with them. It is not our desire to limit your plans, but to protect our own relationships with those who give directly to the Southern Museum of Music on a regular basis.

Because there are some companies who already provide great support to our museum, and educational programs, we must be careful about duplicating efforts and making these groups feel like a lot of people are asking for donations on our behalf.

Additionally, we must not approach any company outside the counties our Southern Museum of Music serves. There are Southern Museum of Music representatives and supporters hosting events all across the country and we want to be sure we are not infringing on any other individuals efforts.

Third-Party Fundraising for Southern Museum of Music



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Southern Museum of Music is very grateful for your generosity and efforts in raising funds and awareness in support of our mission to enrich the Southern Music experience. In an effort to provide the best support to you and to continue to direct most of our resources in the development of our world class museum, the Southern Museum of Music is pleased to provide the following based on your level of fundraising.

Please note that these resources are not guaranteed, and the distribution of these resources will be dependent upon the progress of the event. The Southern Museum of Music reserves the right to check in with the event organizer on a bi-weekly basis leading up to the event.

\$5,000 net **minimum guarantee** is requested for any use of the Southern Museum of Music® logo. and Name
\$2,000 net minimum guarantee is requested for any use of the Southern Museum of Music® name **only**.
(Example: "Proceeds/ a portion of the proceeds from this event will benefit Southern Museum of Music®"). This statement can be used in promotional materials –website, fliers, posters, etc.

\$2,000 - \$4,999

- Permission to use the Southern Museum of Music name*
- The use of Southern Museum of Music disposable banners and digitally distributed fact sheets
- Event endorsement letter indicating the Southern Museum of Music as event beneficiary

\$5,000 - \$14,999

- Items noted above
- Use of Southern Museum of Music logo on print promotional materials such as posters, fliers, etc.*

\$15,000 - \$29,999

- Items noted above
- Upon request, social media recognition, providing that the event/promotion falls within a mutually agreeable media window***

More than \$30,000

- Items noted above
- Opportunity to request Southern Museum of Music Volunteers and V.I.P. Music Industry Ambassadors**
- Upon request, collaboration with staff to issue one press release, providing that the event/promotion falls within a mutually agreeable media window*** (media not guaranteed)
- Gold Record Founders Club participation.

PLEASE NOTE:

*The Southern Museum of Music **MUST APPROVE** all uses of its name and logo in advance of its reproduction, printing or distribution. Please see #4 under Terms and Conditions on the Special license Agreement.

**The Southern Museum of Music will do its best to accommodate Volunteers and V.I.P. Music Industry Ambassador request, but requests are not guaranteed. Confirmations of volunteers, V.I.P. Music Industry Ambassador's attendance is dependent on event's progress 14 days prior to the event.

***Media not guaranteed.



Third-Party Event Guidelines & Procedures

Closing Out Your Third-Party Fund-raiser

Please deliver funds to the Southern Museum of Music within 14 days. You can mail donations, deliver donations in person, or we can arrange to pick them up from you.

It is your responsibility to acknowledge any Third-Party donors who contributed to your event. If you would like the Southern Museum of Music to send a Thank You letter to Third-Party donor participants in your event, you must submit the donor's name and address to the Southern Museum of Music following the event.

Southern Museum of Music will not provide tax acknowledgments for any Third-Party fund-raiser events.

Thank you again for choosing to organize an event, to help archive and educate individuals, on the effects of Southern Music world-wide. Should you have any questions, or should you want to speak with a member of our team for any reason, please feel free to call us at (404) 627-4734.

Frequently Asked Questions

As you begin to plan your event please be sure to read over the commonly asked questions and answers below. They serve as guidelines and will help you stay within the Terms and Conditions of the Special Event Proposal and License Agreement and will aid in having a successful event.

- ❖ **Q. If my external event is approved and I hold the same event next year, can I use the same agreement from the previous year?**
A. No. The licensing agreement is good for only the event and time-frame outlined in the agreement and expires at the conclusion of the event, one year from the date of approval, or upon the decision of Southern Museum of Music. Annual events are common and encouraged, however, and the second year takes less time to approve.
- ❖ **Q. If I conduct an external event, can I reserve funds for the next year's event in a special account?**
A. No. The money raised from a fundraising event must be turned into the Southern Museum of Music and will be recorded as donations received for the purpose of supporting the museum.
- ❖ **Q. If I am soliciting for a Southern Museum of Music event, is there anything I need to do before contacting a sponsor/vendor?**
A. Yes. The Southern Museum of Music will require a list of businesses that you are interested in contacting before planning your event, so that we will not jeopardize existing relationships with existing donors, sponsors and members.
- ❖ **Q. What type of credentials can I provide when I solicit funds?**
A. Upon request, each approved event will be issued an acceptance letter on official Southern Museum of Music letterhead, verifying that your event has been approved by the executive board.
- ❖ **Q. Are there any events or types of fundraising that the Southern Museum of Music does not permit?**
A. The Southern Museum of Music policy states that we are NEVER permitted to use telemarketing or door-to-door solicitation in our fundraising efforts. We also cannot raise funds via Internet, through vending machines, or solely from liquor sales (proceeds from all food and beverage sales combined are acceptable).



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- ❖ **Q. Does Southern Museum of Music have insurance that covers liquor liability, gambling, raffles, etc.?**
A. Southern Museum of Music does not provide insurance coverage for external events. The event host must obtain insurance when necessary. Please note: special permits or licenses can take up to 4-6 weeks.
- ❖ **Q. May I contact celebrities for my event?**
A. Southern Museum of Music has approval procedures in place for contacting celebrities on behalf of the organization. Even if you have personal contact with celebrities, please talk to your Southern Museum of Music contact before you contact anyone. Southern Museum of Music will not contact celebrities on behalf of your event. This policy is in place so that we do not jeopardize our celebrity and music industry contacts.
- ❖ **Q. May I invite Southern Museum of Music founders and executives to attend my event?**
A. We are happy to discuss inviting one of our executive leaders to attend or speak at your event. This is decided on a case by case basis as we must be respectful of each individual's time and their privacy.
- ❖ **Q. Can I sponsor a specific exhibit, music genre or educational program?**
A. YES. You can be provided the marketing material of a specific area of interest with details to use to demonstrate how your event donations can specifically be used. Generally all funds from events go into our active operational fund.
- ❖ **Q. What are the IRS and Better Business Bureau laws and regulations regarding charitable contributions?**
A. A quid pro quo donation is when a donor gives money to a charity that is partly a contribution and partly an exchange for goods and/or services. Only the excess contribution from the money given less the value of the goods and services is allowable for the donor to use as a charitable deduction (e.g. the concert VIP Access Experience cost \$350 per ticket; the estimated value for the performance was \$40, so the difference of \$110 may be tax deductible). The percentage or amount that is deductible MUST be disclosed at the point-of-sale (printed on the concert ticket, poster, advertisement, etc.).
- ❖ **Q. How is Fair Market Value Determined?**
A. IRS Publication 561 defines fair market value as "...the price that property would sell for on the open market." The fair market value of goods or services that generally are not commercially available may be determined by using the fair market value of similar or comparable goods or services. Goods or services may be similar or comparable even if they do not have the unique qualities of the goods or services being valued. A "good faith estimate" must be made in determining the value of the exchange.

How do I forward the proceeds raised at the event?

Online Donations

Fill out a simple and secure online form to donate.



Donate Using PayPal

Make a secure donation using PayPal.

By Mail *(Please send a check to)*

Post Office Box 3146
Atlanta, Georgia 30312

If you have time, jot us a note with your check.

We really like to hear from you!

Donate by Phone

Call 404-627-4734 to make a credit card donation over the phone.