



# *Getting Started*

## Philanthropy Guide

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Updated January 2022

### Topics Covered

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Foundation 101

Event Planning Tips

Event Finances Tips

Risk Management Policies

Collecting Donations

After Your Event

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## Mission & Vision

### About the Foundation

Alpha Phi Foundation made history on April 15, 1956 when it received its non-profit designation. Alpha Phi became one of the first women's fraternities to establish a foundation.

Demonstrating the philanthropic spirit of love and charity intended by our Founders, the Foundation was first created as a trust to award grants specifically for scholarship and cardiac aid.

Today, Alpha Phi Foundation is the philanthropic partner of Alpha Phi Fraternity, and the original priorities of the Foundation remain.

YEAR FOUNDED

**1956**

### Our Mission

**Advancing women's lives  
through the power of  
philanthropy**

TAX ID OR EIN #

**36-3895478**

*Alpha Phi Foundation  
is classified as a 501(c)  
(3) organization by the  
Internal Revenue Service.*

*Donations to the  
Foundation are tax-  
deductible in the United  
States as allowed by law.*

Through our five vital programs, we are able to put our mission into action. Alpha Phi Foundation supports Alpha Phi Fraternity, our members and the communities in which they reside in their pursuit to advancing women's lives now and into the future.

## Foundation Programs

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### Leadership

Alpha Phi Foundation committed to supporting Alpha Phi Fraternity and its evolving needs as it develops innovative leadership programs and training opportunities for its members, including Alpha Phi Leadership Institute, Educational Leadership Consultant (ELC) program, Congressional Hill visits and more. [Learn more...](#)



### Scholarship

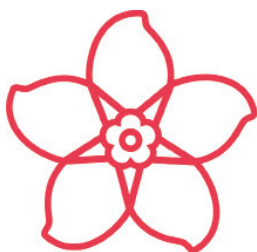
Each year, Alpha Phi Foundation awards over 70 merit and need-based scholarships to undergraduate and graduate Alpha Phis. We are proud to recognize the remarkable accomplishments of Alpha Phi members by providing the additional means for them to pursue advanced degrees without burden. [Learn more...](#)



### Women's Heart Health

Alpha Phi Foundation awards an annual \$100,000 Heart to Heart Grant funding innovative projects addressing the need for specialized care and education supporting women's heart health.

[Learn more...](#)



### Forget Me Not Grants

Alpha Phis are sisters for life, supporting one another through every life stage and helping each other in times of need. We exemplify this life-long support through the Forget Me Not Grant Fund.

[Learn more...](#)



### Heritage

Alpha Phi Foundation is dedicated to collecting, preserving and sharing the history of our organization—a history rich in women's leadership. The Foundation funds the written and oral histories of Alpha Phi International Fraternity. [Learn more...](#)

## Foundation FAQs

### Q: Are donations 100% tax-deductible?

A: Absolutely! Alpha Phi Foundation is a 501(c)(3) charitable organization, which means that all gifts to the Foundation are tax-exempt to the fullest extent allowed by law.

### Q: How can I request our chapter's giving history?

A: Email our [chaptergiving@alphaphifoundation.org](mailto:chaptergiving@alphaphifoundation.org) to request your chapter's giving history. Remember to include your chapter name and date range.

### Q: How do we send donations to Alpha Phi Foundation?

A: Please refer to the Donations section. If you need additional assistance.

### Q: May we use a copy of Alpha Phi Foundation's tax-exempt certificate so that we can be exempt from sales tax?

A: Unfortunately, no. Chapters are unable to use Alpha Phi Foundation's state tax-exempt certificate to receive exemption from state sales tax from goods or services. The Foundation is recognized by the IRS as a 501(c)(3), whereas Alpha Phi Fraternity and its chapters are recognized as a 501(c)(7) organization, or social clubs. Moreover, the Foundation's tax exempt certificate does not apply to all states. Please factor sales tax into your chapter budgets when you are planning your philanthropic efforts.

### Q: Where can I find the Nonprofit Status Letter?

A: For those who request information about Alpha Phi Foundation, like the mission, Tax ID or W-9, you can find the nonprofit status letter on our website in the Philanthropy Toolkit. [Go now...](#)

## What is a 501(c)(3)?

Section 501(c)(3) is the portion of the US Internal Revenue Code that allows for federal tax exemption of charitable and educational nonprofit organizations.

[Learn More...](#)

## Who leads the Foundation?

The Foundation has a nine-member Board of Directors, an Executive Director and a staff dedicated to taking our efforts to new heights.

[Meet the Board](#)  
[Meet the Staff](#)

## What do our funds support?

Your chapter fundraising helps make our programs possible! Each year we publish a Donor Impact Report to illustrate the power of your philanthropy!

## Things to Consider When Planning An Event

### Know your History

Has your chapter planned this event before? Did the former organizer leave any notes, tips or feedback? What were the successes and challenges of previous events? What could we do better this time around?

If you have specific questions about your chapter's previous events, reach out to the former officer, chapter advisor, or the Foundation staff.

### Campus Culture

Every campus is different. Ensure that your philanthropy meets the needs and requirements of your campus.

Be socially-conscious when planning and branding your events. How will your campus respond to your event? How will your local community respond?

There are countless ways to give back—each and every year, chapters craft up new, creative ways to support Alpha Phi Foundation. Before you start your event planning, take some time to evaluate your chapter's goals, needs and budget.

#### What do I want to accomplish?

Some events are focus on education and raising awareness, like blood drives and spin classes. Others focus on fundraising, like auctions and 5K runs. Identify your goals and reverse engineer your philanthropy event success!

#### Who is our target audience?

- How do we reach our target audience?
- What do we want them to do—attend, give, share?
- How do we get them to care about our cause?

#### When should we plan our event?

- Is there enough time to plan this event well?
- What does the chapter's social calendar look like? Campus calendar? Holiday calendar?
- Which dates are ideal for our target audience?

#### Where should we plan our event?

- Will we need access to WIFI, A/V equipment, utilities?
- Is there enough space for our activities/attendees?
- Will we need a back-up venue if it rains?
- How will members and attendees get to the venue?

#### How can we make this happen?

- How can we involve the whole chapter?
- What is our budget?
- Will we need sponsors?
- Will we need to solicit in-kind donations?
- Should there be an entry fee or ticket?

Know that you can always consult your advisors or the Foundation staff—you are not alone!

## Building an Event Timeline

We recommend you start planning your philanthropy calendar at least 6 months in advance. Here are some things to consider when building your event timeline:

### If we're going to do it, let's do it right.

It's easy to get excited and start rushing through the motions, but remember event-planning takes time. Give yourself time to solicit donations and secure key sponsorships, to consider multiple venues and compare which is best, and to market your event well.

### Consider all calendars and give plenty of notice.

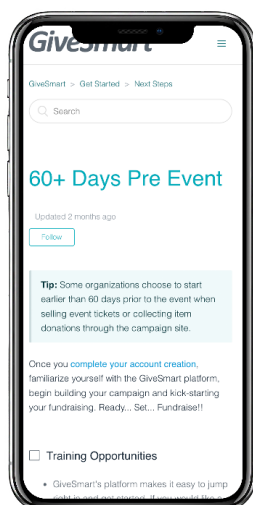
To ensure the best possible attendance at your event, refer to your chapter calendar, Greek Life calendar, campus calendar, holiday calendar, etc. Pick a date that's smart and strategic. Send Save the Dates well in advance to make sure your attendees can, in fact, *save the date*! PRO TIP: Invite chapter alumnae and local alumnae to your events. Let them know what your chapter is up to. You may be surprised at how willing they are to get involved and support their Alpha Phi sisters!

### Secure the venue and work backwards from there.

Locking down a venue—whether it's the soccer fields, local theater or banquet hall—is absolutely key to your event. Many of your event details will hinge upon this location.

### Work hand in hand with your VP of Finance.

Together, you will determine what type of event(s) make sense for your chapter and budget. Your VPF can help you outline an event budget well in advance. Doing so helps to ensure that your event-planning runs as smoothly as possible!



#### RECOMMENDED RESOURCE GiveSmart Event Timeline

Include GiveSmart in your plans and follow the steps in the timeline to ensure your GiveSmart event site is ready for use by the time of your event!

[Learn More on our GiveSmart page...](#)

#### RECOMMENDED RESOURCE Event Timeline Template

Not using GiveSmart? Use the event timeline template to help organize your event-planning and keep you on task! Remember to make it your own and tailor it to fit your chapter event!

[Download this resource from the Philanthropy Toolkit webpage...](#)

## Submit Your Event

Submitting an event to Alpha Phi Foundation is easy to do and comes with benefits!

### Spread the word!

Submitting your events keeps our team in the loop about your exciting philanthropic efforts!

### Sign up for GiveSmart

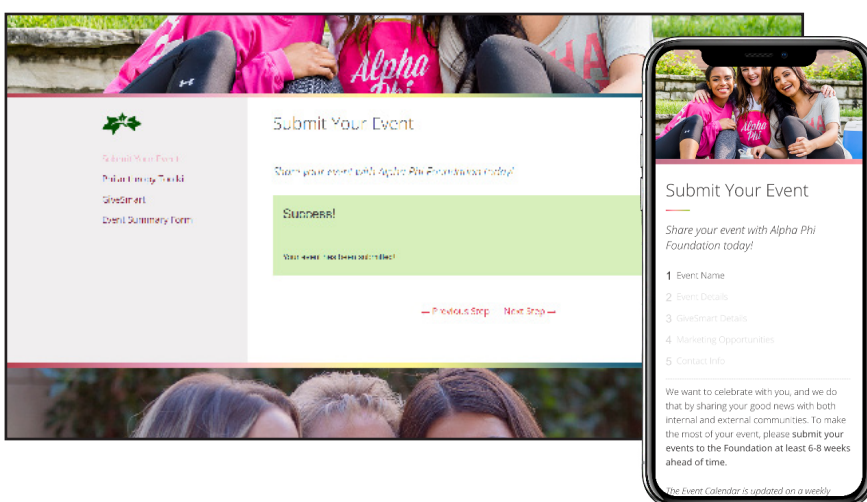
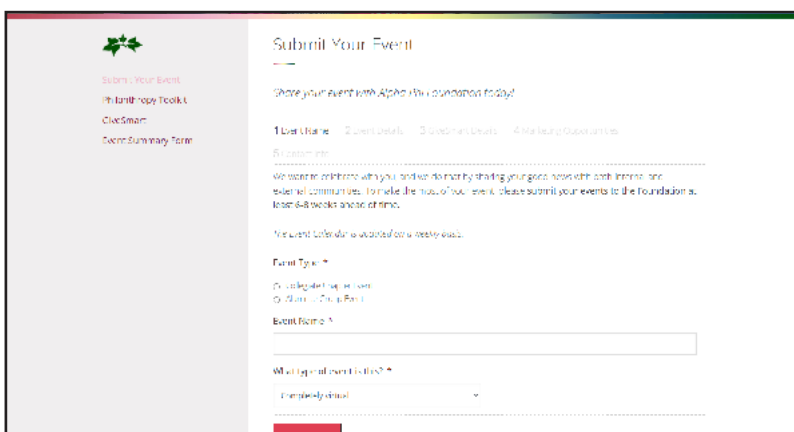
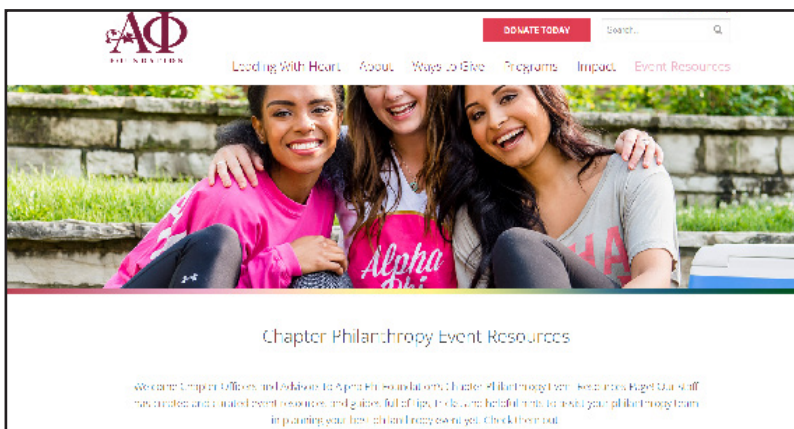
You have the opportunity to activate your FREE Alpha Phi chapter Givesmart account when you submit your event.

### Instagram Takeovers

When you submit your event, share your interest in hosting an Instagram Story Takeover after your event on the Foundation's account.

### Ask for help!

Share your event details and ask Foundation staff for help and suggestions.



GO TO

[www.alphaphifoundation.org/events](http://www.alphaphifoundation.org/events)

TO SUBMIT YOUR EVENTS



## Philanthropy Event Idea Bank

No two chapters are the same, so your philanthropy efforts shouldn't look the same either. Make sure that you are choosing the right events for your chapter—events that fit your chapter's membership, location, campus culture and budget.

### RED DRESS

The Red Dress brand can be anything you want it to be—big or small, fancy or laid-back, gala or potluck! Have fun with it and be creative!

- Brunch
- Dance
- Gala
- Casino/Poker Night
- Fashion Show

### HEART HEALTH WEEK

These are mult-day philanthropy events that focus on heart health awareness and education. Sometimes chapters host several types of small events throughout the week.

- Blood Drive
- CPR/AED Training
- Wear Red Day
- Pie-a-Phi

### ENTERTAINMENT & PAGEANT

Show off the talents (and competitive nature) of your community with a show!

- Comedy Show
- Lip Sync Competition
- Talent Show
- Fashion Show
- Heartthrob
- King of Hearts

### FOOD-BASED EVENTS

Gather your community together for some food and fundraising! Bonus points if your food event is heart-healthy!

- Cook-Off
- Mac N Phis
- Trail Mix Bar
- Bake Sale
- Barbecue
- Restaurant Give Back
- Food Truck Festival
- Apple Picking
- Alpha Phreeze
- Coff-PHI

### MOVE YOUR PHI'T

These events include any type of event that gets your heart pumping—running, dancing, kickball, 3x3 basketball tournaments or golf—just get to moving!

- 5K Walk/Run
- Alpha Phifa
- Fast Phi't
- Phi Ball
- APhi Bowl
- Hoops for Hearts

### DoP Facebook Group!

Join fellow Directors of Philanthropy on Facebook to ask your sisters about their events and for their ideas!

## Building a Budget

Here are a few tips to consider as you create an event budget:

### Be realistic.

Rule out venues and services that fall outside your budget. Expenses can accumulate quickly in event planning. If something is already outside of the budget, don't waste your time considering it.

### Shop around.

Do your research on the items will incur the most costs and gather quotes from multiple vendors. You will gain a better understanding of your goods/service and your costs. Who knows, maybe a vendor will price match for you!

### Solicit in-kind donations and sponsorships.

Use in-kind donations from individuals and local companies as a way to keep costs down. In-kind donations may be tax-deductible. You may also use sponsorships to help offset your event expenses. Sponsorships are not tax-deductible contributions.

### Remember your goals.

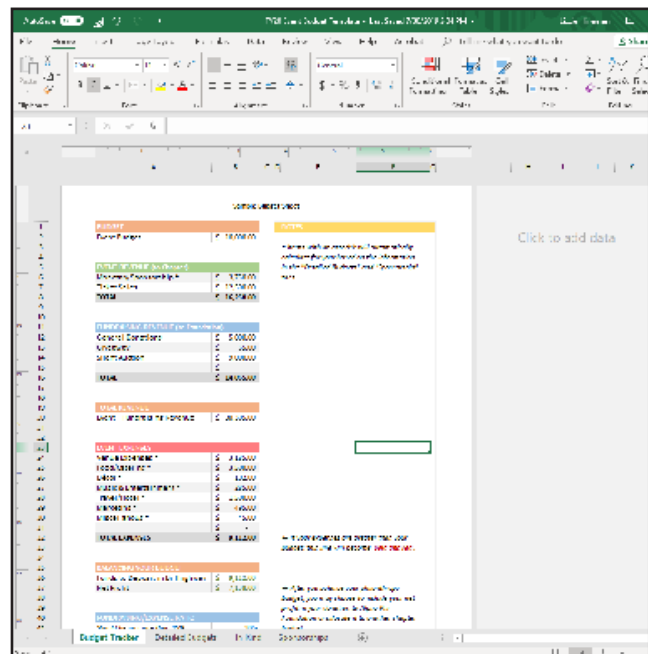
Be resourceful, innovative and smart with your event budget. Your goal is not to spend money, it is to raise funds and awareness for a cause near and dear to your heart. If your event doesn't pay for itself, you may be missing your mark.

#### RECOMMENDED RESOURCE

### Event Budget Template

This resource is designed to help keep track of your budget, in-kind donations, and sponsorships, if applicable. As you enter anticipated and actual expenses, the sheet will automatically calculate in the first tab.

Keep in mind that this budget worksheet should be adapted to fit your chapter's needs. [Learn more...](#)



## Ticketing

Ticket sales can make or break an event. Depending on what type of event you are organizing, ticket sales may serve different purposes:

### When ticket or entry fee revenue is a donation...

With events like Alpha Phi or Mac & Phi, the entry fees or tickets may be donations to Alpha Phi Foundation.

This may be the case if your chapter does not need to reimburse the chapter budget because the officers have budgeted for the event expenses. If you have questions, consult your finance officers and/or advisors.

### When ticket revenue covers the cost of the event...

If you are planning an event that requires a larger budget, like a 5K Run/Walk or Red Dress Gala, your ticket revenue may need to help cover your event costs.

In this case, chapters may choose to use the philanthropy budget to help *front* event costs. For instance, if you need to put down a deposit for a venue or pay for decorations, and you haven't received ticket revenue yet—use your philanthropy budget.

If your ticket revenue is not a donation to Alpha Phi Foundation, please deposit those funds into your chapter's Billhighway account to help offset your event expenses.

After your chapter has covered all event costs, your chapter may choose to send any net profits to Alpha Phi Foundation by cutting a check from Billhighway.

### HOW TO Determine the Price of Tickets

Example, you are hosting a Zumba-a-thon event! Take into consideration all of your event's costs and divide that by your attendance goal:

Venue:	\$150
Instructor:	\$100
Water/Snacks:	\$250
A/V:	\$250
T-shirts:	\$1,200
Marketing:	\$200
<b>Total</b>	<b>\$2,150</b>

Goal Attendance: 150

$$2,150 / 150 = 14.33333...$$

To help cover the cost of your event, the registration fee should be more than \$15. If you have more than 150 people—fantastic, you're in the **green**!

If your venue has a maximum capacity, remember to take that into consideration.

## Ticketing

### WHEN TO USE Text-to-Give for tickets

If ticket or entry fee revenue is intended for donation to Alpha Phi Foundation, you can use text-to-give for your tickets. Here's how it works:

Text [EVENT KEYWORD]  
to 52-182

Follow any prompts  
(i.e. text your first and  
last name)

Receive the welcome  
text for the event

Text GIVE and the  
desired donation  
amount, like GIVE10,  
GIVE15, or GIVE100.

Receive a thank you  
text confirming your  
donation amount

TIP: Create an easy  
KEYWORD specific to  
your event such as,  
Phifa20 or aphi5k

## Online Tickets

**GiveSmart is the easiest and most reliable online platform for your chapter to use in planning and executing your event.** Alpha Phi Foundation's partnership with GiveSmart allows Alpha Phi chapters to utilize the GiveSmart platform **free of charge**.

With GiveSmart, you can create custom event site to host your ticketing and registration, as well as donation forms, mobile bidding, live and silent auctions, text-to-donate, and more!

Attendees can make easy and secure purchases or donations via credit card on your GiveSmart site. All transactions can be viewed in real-time on your online admin dashboard and reporting features.

When you use GiveSmart, your chapter's ticket funds will be sent via check to Billhighway and donation funds will be sent to Alpha Phi Foundation electronically. Your chapter officers can decide whether to donation ticket funds or reallocate them to other chapter efforts. Funds are disbursed after your event, unless noted otherwise.

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#### RECOMMENDED RESOURCES

#### **Foundation Resources and the GiveSmart Help Desk**

Foundation staff in partnership with GiveSmart has gathered resources to support you in your event-planning - before, during and after! [Learn more...](#)

GiveSmart also provides an online Help Desk with instruction guides, how-to videos to teach or refresh, webinars with their experts, and online chats with their representatives. [Learn more...](#)

## Ticketing

### Tickets by check

Before you have a donor write a check, make sure you know where the ticket revenue needs to go.

Is your chapter using ticket revenue to offset event costs **or** is it a donation to Alpha Phi Foundation?

**If it is meant to offset event costs**, instruct donors to make checks payable to your chapter (e.g. "Gamma Chapter of Alpha Phi Fraternity" or "Kappa Theta Chapter of Alpha Phi"). These checks should be deposited into your BillHighway account to help balance your budget. These payments are not donations and are not tax-deductible.

**If the ticket revenue is meant as a donation**, instruct donors to make their check payable "Alpha Phi Foundation" with the event name in the Memo field. Do NOT deposit these checks into your Billhighway account. Instead, mail all individual checks to Alpha Phi Foundation within 30 days of your event. These payments are donations and will be tax-deductible.

### Tickets by cash

If you choose to accept cash payments, make sure to organize a cash box beforehand with more than enough cash and change for the event.

After your event, do not let the cash box sit around. Deposit the cash into the chapter's Billhighway account or change the cash into a Money Order (aka MoneyGram, Cashier's Check) and deposit it into the chapter's Billhighway account.

### HOW TO Write a Check

#### Step 1

Fill in today's date on the line in the upper right corner labeled date.

#### Step 2

Write in the name of the recipient or payee in the "Pay to the Order Of" field.

#### Step 3

Fill in the numerical amount next to the dollar sign (\$),

#### Step 4

Write the written form of the same amount on the line beneath the payee name.

#### Step 5

Sign the check on the bottom right line

#### Step 6

Consider adding a MEMO about the check's purpose on the lower left line.

## Ticketing

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### Other methods for collecting ticket revenue

Alpha Phi encourage chapters to use GiveSmart, when possible. However, if GiveSmart isn't right for your chapter, you may opt to use another third-party platform, like i.e. EventBrite or Greeks4Good. **The company or application you choose to use must be able to cut your chapter a physical check for the funds collected.** If a check cannot be cut, the chapter cannot use the company.

Alpha Phi collegiate chapters use Billhighway to manage chapter funds. In Billhighway, chapters do not have unique bank accounts, which means chapters are unable to provide a third-party platform with a valid bank account and routing number to electronically deposit funds. If a third-party platform tries to deposit funds into BillHighway via a direct deposit, BillHighway will deny the deposit(s) and will charge the chapter \$25 per transaction.

It is also important to note that **Alpha Phi Fraternity and Alpha Phi Foundation have asked chapters to please refrain from using an officer or advisor's personal bank account to collect chapter funds due to liability issues.** Please do not use applications or sites like Venmo, Square, PayPal, Greater Giving Payables, etc., that are connected to a personal bank account.

### Frequently Asked Questions

**Q: If our tickets were intended as donations? Should I send funds to Alpha Phi Foundation using the Send Money feature on Billhighway?**

**A:** No. You should not send money to the Foundation using the Send Money feature on Billhighway. Instead, submit a check request to your VPF and mail the donation check with a Donation Cover Sheet to Alpha Phi Foundation.

**Q: When will GiveSmart disburse our ticket funds to our chapter?**

**A:** GiveSmart will disburse your ticket funds within a week of your request. It may take 2-3 weeks for the funds to hit your Billhighway account though. If you're in a pinch and need to request an early payout, email [chaptergiving@alphaphifoundation.org](mailto:chaptergiving@alphaphifoundation.org) and your GiveSmart account representative to learn more.

**Q: Can we sell tickets using Billhighway?**

**A:** We recommend that you use GiveSmart or another third-party platform to sell tickets. Billhighway is not an ideal ticketing platform.

## Event Planner Guide & Contracts

### Event Planner Guide

This Event Planning Guide (EPG) provides a framework of questions for conversation about planning events. This guide should be an opportunity for advisors and officers to have detailed structured conversations about events that are planned by the chapter with and without alcohol.

The goal of this document is to help you think critically about event planning. In addition to this Guide, please make sure that you also review and comply with the International and campus risk management policy as you plan an event, including submitting any required campus documentation within an appropriate timeline.

**The officer responsible for planning the event should complete the Event Planning Guide at least two weeks prior to the event to allow enough time for all of those eyes to see it!**

Note: This guide is separate from submitting your event to the Foundation.

### Handling Contracts

As a part of planning your event, you may need to sign a vendor agreements or contract. Please do NOT sign contracts without advisor review.

A second set of eyes is needed to review all contracts for clauses such as cancellation deadlines, breach of agreement, gratuities, or food minimums. All contracts, prior to signing, should also be reviewed by Alpha Phi's insurance provider, Holmes Murphy.

Chapters could lose money if contracts aren't reviewed carefully. Better safe, then sorry!

AT LEAST  
**2 WEEKS**  
AHEAD OF TIME

## Certificate of Insurance

AT LEAST  
**3 WEEKS**  
AHEAD OF TIME

How do you get proof of your chapter's insurance coverage for a venue? How do you add the venue as an additional insured party? Don't sweat it! Here's how:

### Step 1

Email [HolmesMurphy@alphaphi.org](mailto:HolmesMurphy@alphaphi.org) to contact Alpha Phi's agent at Holmes Murphy Insurance.

### Step 2

Please be prepared to provide your name, chapter name, contact number, and any associated contracts with the vendor for whom you are requesting the Certificate of Insurance.

### Step 3

A copy of the certificate will be sent to you and any other requested party.

If you prefer to talk to our agent over the phone, you may call Trudy at 402.898.4163

NOTE: The Executive Office is not able to provide these certificates.

**You are strongly encouraged to contact Holmes Murphy Insurance at least three weeks prior to the date you need your certificate to ensure enough time to receive it.**



## Alcohol Policy

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Alpha Phi International Fraternity's Risk Reduction & Safety Philosophy seeks to empower individual members to make informed decisions and expects personal responsibility from its members through local self-governance. As with any event, a chapter is expected to adhere to all Alpha Phi policy and country, state, province, county and city laws, and make every effort to ensure a safe environment.

Alcohol should not be a primary component of collegiate chapter philanthropic events. However, a cash bar is permissible at an event, using a licensed third-party vendor, where a sizable portion of the audience consists of alumnae or parents of Alpha Phi members. It is expected that the chapter adhere to all risk reduction policies during the event.

Please remember:

- Alpha Phi chapter funds may NOT be used to purchase alcoholic beverages nor may anyone on behalf of a chapter coordinate the collection of any funds for such purchase.
- Alcoholic beverages may NOT be sold or served by Alpha Phis at Alpha Phi sponsored events.
- Collegiate chapters shall NOT sponsor or co-sponsor any function with any distributor of alcoholic beverages or brewing company.

### **Best Practice for Alcohol Donations**

Occasionally, chapters will receive donations from vendors that include alcohol or wine, to be used as a prize for a wine pull or silent auction.

It is the chapter's responsibility to ensure all applicable laws and policies are followed when hosting this type of activity. It is recommended that if you choose to utilize donations in this way, the vendor providing the alcohol is present and dispenses the wine/silent auction item so that they can also ensure the winner is of legal drinking age or that a voucher is provided to the winner to use later at the vendor's location.

It is advised that the alcohol be picked up at the end of the event, as alcohol provided in this manner may not be consumed during the event.

## Collecting Donations

Below are five ways to collect donations at your philanthropy event. Not all events are the same, be sure to choose the right donations method for your event.

### Option 1: GiveSmart

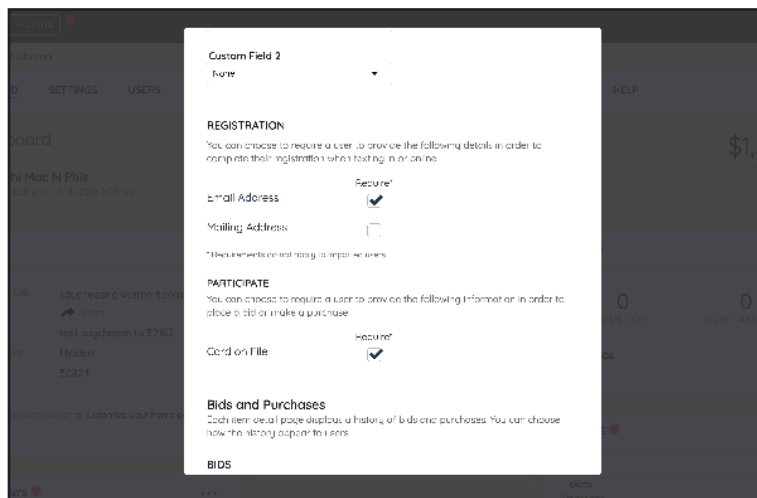
You can process and track cash, checks, and credit cards donations with GiveSmart! On your GiveSmart event site, include a direct donation form and choose the suggested donation amounts or donors can enter their desired amount. When someone gives on this donation form, their gift is 100% tax-deductible and will be included in the event's donation funds sent to Alpha Phi Foundation.

Those purchasing tickets through your GiveSmart site will have the opportunity to donate before they checkout, too! Remember, GiveSmart keeps your ticketing and donation funds separate so you won't have to worry about dividing funds yourself. With GiveSmart you can also process and track donations from auctions and other Instant Buy items. Remember, proceeds from auctions and Instant Buy items are set as donations to Alpha Phi Foundation. If you have questions, email [chaptergiving@alphaphifoundation.org](mailto:chaptergiving@alphaphifoundation.org).

#### HELPFUL TIP

##### **Require a card on file!**

We recommend requiring that a card be put on file when someone registers or purchases a ticket to your event. You can make this a required field in your GiveSmart Settings. Doing so will ensure that all purchases or donations made during the event are processed and paid in full, and that no one leaves your event without paying for something they won, especially auction items! This makes closing your event and requesting disbursement a breeze!



If an attendee leaves before the end of the event, you can send them a text through GiveSmart prompting them to complete their payment on their mobile phone or you can process the transaction yourself.

Remember to send out an email or text through GiveSmart thanking everyone for making your event a success!

## Collecting Donations

### Option 2: Chapter Event Donation Form

Not using GiveSmart? Alpha Phi Foundation has a online donation form made just for you! Making an online donation is quick, easy and safe!

Visit and bookmark this webpage:

<https://www.alphaphifoundation.org/donations>

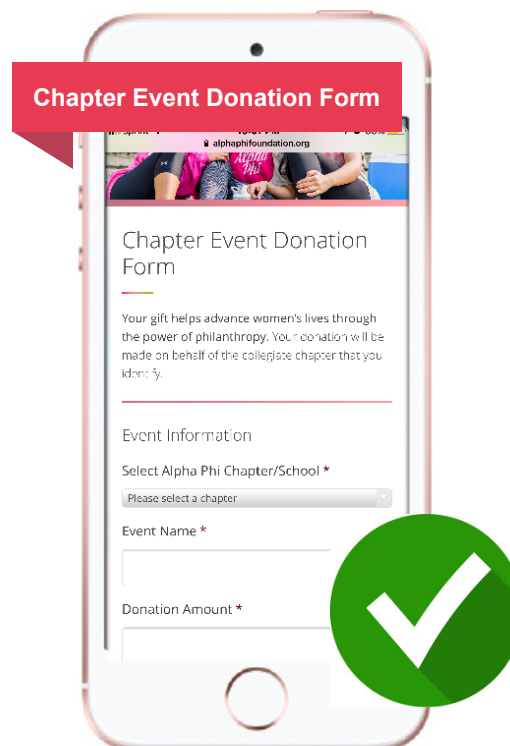
Include the link to the Chapter Event Donation Form on your event page. Share it with your attendees, chapter alumnae, and local alumnae on social media and email, so that donors are able to make convenient, online gifts before, during, and after your event.

Upon a successful online transaction, donors receive an email receipt for their gift. Donors may use the email receipt for tax purposes; however, we encourage chapters to write and send thank you letter to all donors.

You won't be able to track donations in real-time when you use the Chapter Donation Form. If you have questions about the donations made through this page, contact [chaptergiving@alphaphifoundation.org](mailto:chaptergiving@alphaphifoundation.org).

**NOTE: Direct your donors to donate on the Chapter Event Donation Form, NOT our general donation form.**

The general donation form does not have a field for donors to indicate they are making a donation on behalf of your chapter's event. If donors go to the general donation form, we cannot guarantee that your chapter will receive philanthropic credit for their gift.



**Chapter Event Donation Form**

alphaphifoundation.org

Chapter Event Donation Form

Your gift helps advance women's lives through the power of philanthropy. Your donation will be made on behalf of the collegiate chapter that you identify.

Event Information

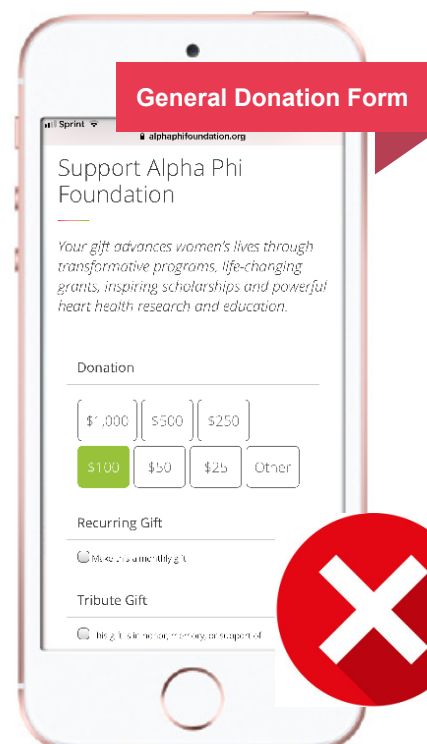
Select Alpha Phi Chapter/School \*

Please select a chapter

Event Name \*

Donation Amount \*

A green checkmark icon is overlaid on the right side of the form.



**General Donation Form**

alphaphifoundation.org

Support Alpha Phi Foundation

Your gift advances women's lives through transformative programs, life-changing grants, inspiring scholarships and powerful heart health research and education.

Donation

\$1,000 \$500 \$250

\$100 \$50 \$25 Other

Recurring Gift

Make a monthly gift

Tribute Gift

Designate memorial, anniversary, or support of

A red X icon is overlaid on the right side of the form.

## Collecting Donations

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### Option 3: Mobile Card Readers

Mobile card readers are helpful at any philanthropy! Card readers enable you to process credit card transactions on the go! There are two types of card readers Alpha Phi Foundation supports:

#### **CardConnect Readers**

CardConnect readers are only compatible with GiveSmart and will link to your chapter GiveSmart events. You can process ticket sales and donations with CardConnect.

CardConnect and the GiveSmart Event App must be used with an Apple device (iPhone 5 and above, or iPad Generation 4 and above). The iPhone or iPad must have a Lightning Connector port. CardConnect devices are \$75/reader for Alpha Phi chapters. This price is only available through Alpha Phi Foundation. After purchase, the card readers are yours to keep and continue using.

[Click here to purchase your CardConnect readers!](#)



#### **MobilePay Card Readers**

MobilePay readers are compatible with Apple and Android devices. You can process donations only with MobilePay. Funds go directly to Alpha Phi Foundation.

Alpha Phi Foundation supports chapters who use MobilePay card readers, however, we no longer distribute new Blackbaud MobilePay card readers. If you are in need of new card readers, we encourage you to learn more about CardConnect card readers.

Still using MobilePay? [View our step-by-step MobilePay Guide to get started!](#)

## Collecting Donations

### Option 4: Cash & Check

When you collect cash and check donations at your event, be mindful that your chapter is responsible for tracking donations and sending thank you note or gift acknowledgements to individual donors.

If you collect cash donations, please do **NOT** mail your cash to Alpha Phi Foundation. Please obtain a money order (aka MoneyGram or Cashier's Check) at a local bank or convenience store. [What is a money order?](#)

If your donors prefer to write a check, please have all checks made payable to *Alpha Phi Foundation*. It is also best practice to include your chapter name and/or event (e.g. Theta Delta/Mac N Phi's) in the MEMO field. Please send each individual donor check directly to Alpha Phi Foundation.



#### Did you know?

Checks can expire. Some banks will refuse to deposit checks after 3-6 months after it is dated. This is why it is important your cash and check donations are sent to the Foundation promptly after your event.

Please do **NOT** deposit all individual donor checks into your chapter Billhighway account to send a single check for all donations to the Foundation. If we do not receive the individual donor checks, Alpha Phi Foundation will not be able to credit the individual donor for their donation and the donor will not receive a tax receipt. Any funds from individual donors that are not directly deposited into the Foundation's account are not be tax-deductible.

**If you collect cash and check donations, it's important that you send your donations to the Foundation within 30 days of your event.**

Please include all money orders and individual checks in a single envelope accompanied by a [Donation Cover Sheet](#). This cover sheet ensures that the Foundation knows what chapter and which event to credit the donations to.

## Collecting Donations

### WHAT IT AN In-Kind Donation?

An in-kind donation, also referred to as gift in-kind, is the charitable giving of goods and services rather than cash. In-kind donations are distinguished from gifts of cash.

#### **What are the benefits?**

Both cash and in-kind donations can provide a tax deduction for the donating company or individual.

Sometimes, contributions of goods and services may enable a donating company to be more generous than it might have been otherwise.

### Option 5: In-Kind Donations

An in-kind donation, also referred to as gift in-kind, is a donation of goods and services rather than cash. Please provide all individuals and companies donating non-cash items with an in-kind gift receipt.

Here are a few examples of in-kind gifts:

#### **Scenario A.**

The owner of Henry's Flower Shop decides to make an in-kind donation of 30 floral centerpieces to your chapter Red Dress Gala.

#### **Scenario B.**

A local alumna owns a Pure Barre studio. You ask whether she'd be able to donate an item for your giveaway. She agrees to make an in-kind donation to your giveaway.

Chapters are responsible for writing gift receipts and sending acknowledgements to in-kind donor.

#### **HELPFUL TIP**

#### **Notify Alpha Phi Foundation for major gifts**

If you have an individual donor whose generosity reaches far and beyond or who makes a gift of \$1,000 or greater, notify Alpha Phi Foundation and we will send that person a written thanks, too. You can never say thank you too many times!

## Sending in Donations

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### **GiveSmart**

When you submit a GiveSmart Disbursement Request, all donations (aka “event closeout proceeds”) will be sent directly to Alpha Phi Foundation. This form needs to be completed for each GiveSmart event. [Click here for more information on closing your event and requesting fund disbursement](#)

NOTE: Please allow 5-10 business days for donations to be imported into our donor database and in your chapter’s fundraising total from the Foundation. Although donation funds are sent directly to Alpha Phi Foundation, the amount may not immediately reflect in chapter giving reports.

### **Chapter Donation Form**

Donations made on this form go directly to Alpha Phi Foundation. There are no additional steps to send in donations.

NOTE: While it may seem like a quicker solution, please do NOT deposit funds into a member, advisor, or family member’s personal bank account and make a bulk donation using the Chapter Event Donation Form. Doing so hinders Alpha Phi Foundation from being able to provide tax receipts to individual donors, and the individual who makes the online donation will be credited for all funds received.

### **Card Readers**

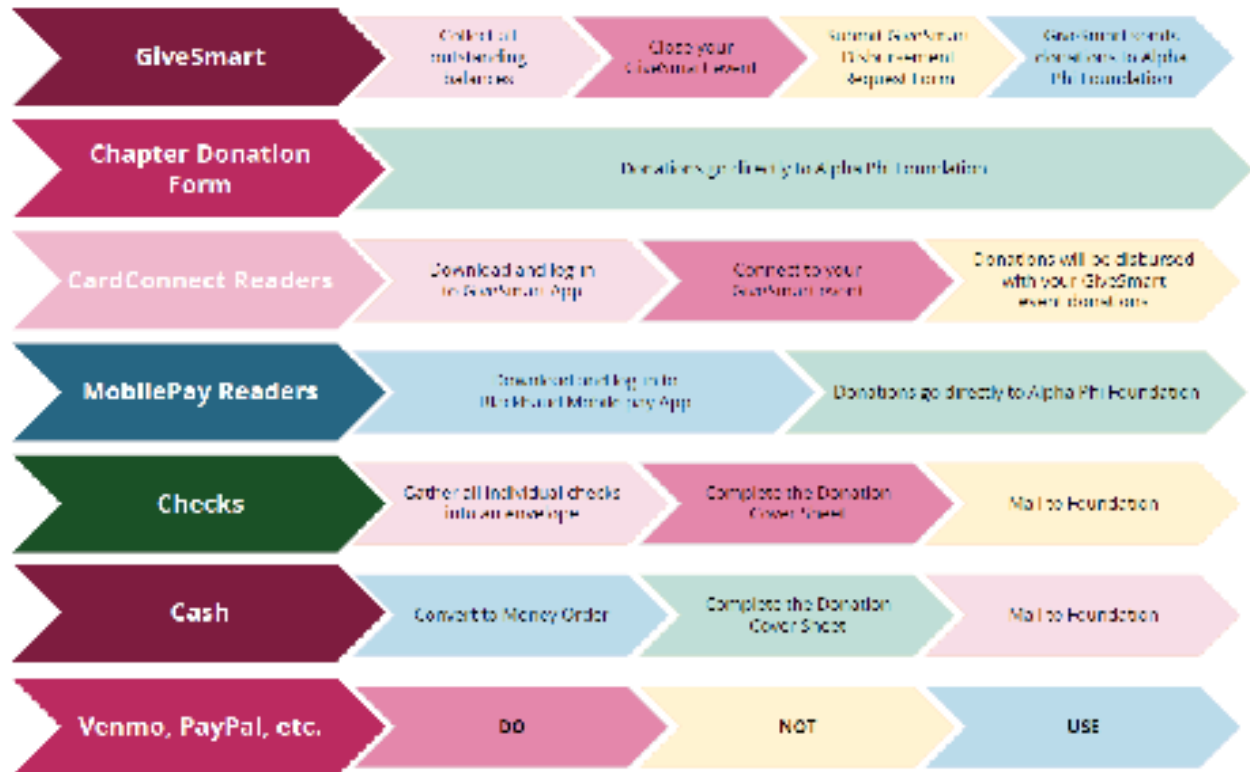
If you use a CardConnect reader, your donations are submitted in the same way all other GiveSmart funds are sent in! If you use a MobilePay reader, these donations are automatically directed to Alpha Phi Foundation and there are no additional steps.

### **Cash & Checks**

Convert all remaining cash into a money order and keep all individual donation checks as they are. You can mail all money orders and checks together in a single envelope accompanied by a Donation Cover Sheet.

## Sending In Donations

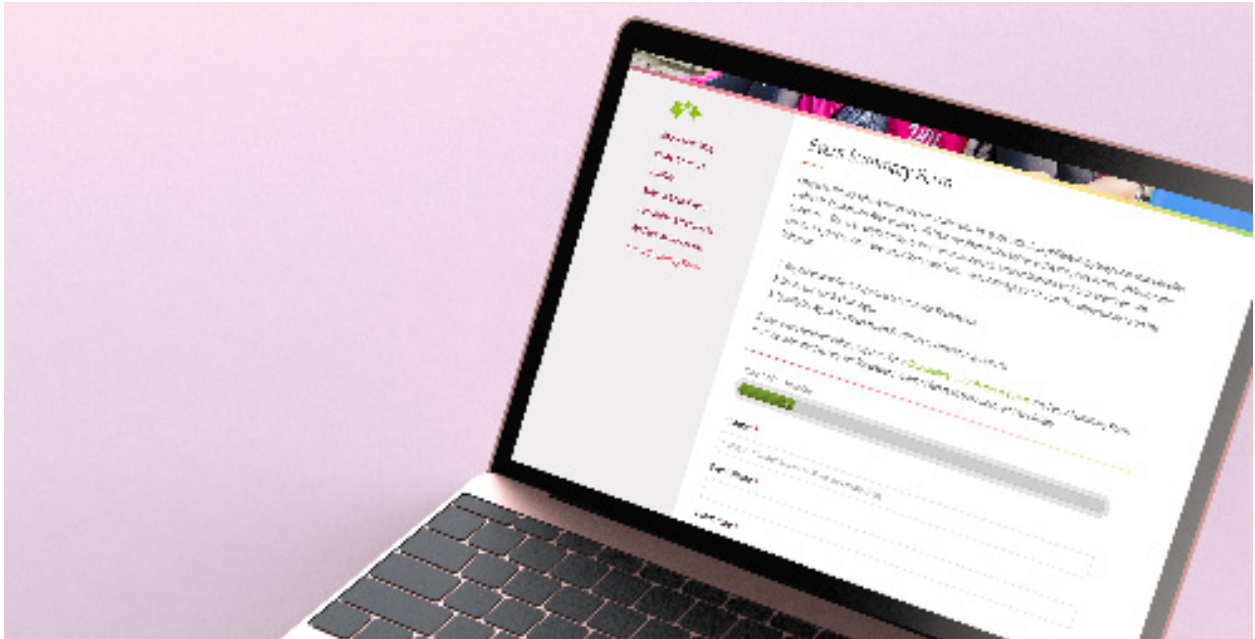
### How to Send in Donations (Graphic)



[Download this image from the online Philanthropy Event Toolkit](#)



## Event Summary Form



Please complete the [Event Summary Form](#) after each of your philanthropy events for Alpha Phi Foundation. This is an opportunity to:

1. Report on your event outcomes to Alpha Phi Foundation
2. Share your successes, challenges, and tips with other Directors of Philanthropy and advisors
3. Qualify for Foundation chapter awards at Leadership Conference and Convention
4. Get highlighted on Foundation social media and in Foundation newsletters
5. Enable Foundation staff to collect data, analyze trends in chapter philanthropy, and create resources to better fit chapter needs.

*Completing the Event Summary Form may take about 30 minutes.*

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### Questions or Concerns?

Contact [chaptergiving@alphaphifoundation.org](mailto:chaptergiving@alphaphifoundation.org)  
or call 847.475.4532

### Alpha Phi Foundation

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[www.alphaphifoundation.org](http://www.alphaphifoundation.org)