



CHAPTERS HANDBOOK



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SECTION 1 – THE HISTORY AND MISSION OF USA CARES

In March 2003, the U.S. entered a large-scale military operation overseas in response to the terrorist attacks of 9/11. In this action, called Operation Iraqi Freedom, numerous military members suffered a wide range of physical and emotional injuries, and their families faced new challenges. They needed emergency assistance to keep a roof over their heads, the lights on, and food on the table. Although the VA covered medical expenses, it did not cover lost wages, and families needed help with essential bills so that service members could access necessary health care to move toward recovery.

In Radcliff, Kentucky, near Fort Knox, a like-minded group of citizens gathered, along with the Army, Kroger, and a local TV station, to make a difference. They decided to raise funds to help military families by selling “Support Our Troops” yard signs. They raised \$121,000, but the need was much greater. In October 2003, a new 501(c)(3) national organization known as USA Cares, Inc. was created with a toll-free call center in Radcliff to process increasing requests for assistance. In 2017, USA Cares relocated its Headquarters (aka HQ) to Louisville, Kentucky.



This was the start of USA Cares. Our mission is to provide post-9/11 military veterans, service members, and their families with financial assistance and post-service skills training to create a foundation for long-term stability. Our services improve the quality of life for them and their families and reduce the potential risk factors contributing to veteran suicide. In late 2021, USA Cares launched the Chapters Program to carry out our mission throughout the United States.

For additional information, please visit our website at www.usacares.org.



SECTION 2 – USA CARES VETERAN & FAMILY SUPPORT SYSTEM

USA Cares exists to assist military families in crisis. We typically receive hundreds of weekly requests and assist these emergencies with an average of \$20,000 weekly. Since inception, we have responded to thousands of requests for financial help with millions of dollars in granted assistance.

USA Cares Mission Statement

USA Cares’ mission is to provide post-9/11 military veterans, service members, and their families with financial assistance and post-service skills training to create a foundation for long-term stability. Our services improve the quality of life for veterans and their families and reduce potential factors that can contribute to veteran suicide.

USA Cares Vision Statement

Stability for military families in crisis.

The following USA Cares Programs are designed to meet post-9/11 military family needs:

- Our ***Military Assistance Response Program*** assists veterans or service members facing temporary financial hardships. We assist in paying essential bills due to military service-related incidents. Our goal is to improve the quality of life to create a foundation for long-term stability.
 - As part of the application process, USA Cares incorporated ***The Financial Education & Empowerment Program*** to support military families facing financial difficulty. We hope to arm military families with the necessary tools to prepare for the unexpected.
- The ***Career Transition Assistance Program*** provides individuals with tools and resources to better prepare them for hiring. It “helps transitioning service members pay essential bills while they train for a new job or while they wait for their first paycheck, relieving any financial barrier that keeps them from getting a new job or career.”
 - The ***Career Readiness Training Program*** is a free web-based service that prepares service members and their spouses for the hiring process, which covers topics such as industry research and skills investigation, resume writing, social media, cover letters, interviewing skills, salary, benefits, and building your network.
 - USA Cares has two Memorandums of Agreement with the United States Army Garrison (USAG) Fort Knox to provide the Career Skills Program Corporate Fellowship or (CSP Corporate Fellowship) for Service Members who are either transitioning out of or retiring from military service in the Fort Knox/Louisville area.
- Click [**USA Cares Programs**](#) to learn more.



How can a post-9/11 veteran, transitioning military member, or family member of a veteran/military member apply for assistance?

- Click [USA Cares - Get Help](#) (or visit usacares.org and click “Get Help” in the upper right corner)

How is USA Cares different?

- **48-Hour Response** – When we are contacted to assist, we can respond to the request and make a payment within 48 hours.
- **A Grant, Not a Loan** – While many other military assistance programs provide loans that only compound a terrible situation, we provide grants. The military family is never asked to repay the funding.

SECTION 3 – THE IMPORTANCE OF A USA CARES CHAPTERS PROGRAM

The USA Cares Chapters Program has been developed to engage committed volunteers who wish to aid veterans through the organization in achieving its mission and vision.

Expanding the Mission

One of the primary ways we strive to expand our mission to help veterans and their families is through our USA Cares Chapters Program. The Chapters are led by passionate volunteers dedicated to helping ensure veterans are cared for through fundraising, donor relations, and spreading awareness of the impact of USA Cares.

Serving Your Communities

Due to the very nature of its mission, fundraising for the Military Assistance Response Program is the *number one priority* of the Chapters Program. The *secondary focus* is for Chapters to develop local corporate relationships to expand USA Cares’ reach in assisting veterans and their spouses with career transitions. With support from the USA Cares Chapter Outreach Department, Chapters will receive guidance to achieve annual goals.



SECTION 4 – CHAPTER ORGANIZATION AND OBJECTIVES

Currently, USA Cares Chapters run the gamut in participation – several consist solely of a Chapter Executive Director (aka ED), others rely on a few Members, and a Chapter Leadership Team leads some. In 2022, the following guidelines will help you work toward a sustainable Chapter structure that will enhance teamwork by encouraging efficient delegation of responsibility.

Chapter Organization

- Chapters will function under the 501(c)(3) status of USA Cares, Inc.
- The volunteer-led Chapter Leadership Team will consist of an ED and four (4) Chapter Leaders representing their local communities (*see Section 5*)
- The Chapters Outreach Manager (aka COM) will deliver the Chapter’s annual financial goal to ED and offer guidance on fundraising and events
- The ED will provide Chapter Leaders with purpose, vision, and guidance
- Each Chapter Leader will commit to forward and comment on USA Cares’ Social Media posts to increase awareness and boost involvement in local and national USA Cares events and initiatives (*see Communications Policy*)
- USA Cares Headquarters (aka HQ) will ship a Resource Kit to each Chapter, including tablecloth runner, USA Cares brochures, promotional materials, etc.
- ED Login will be available on USA Cares’ website, including the Virtual Tool Kit containing Chapter Donation Link, QR Codes, Chapter Logos, etc.
- Chapters will actively participate in nationwide USA Cares initiatives, such as Stars for Heroes, Combined Federal Campaign (CFC), Give For Good, USA Cares Gala, Giving Tuesday, etc.
- All financial income and responsibilities will be run through USA Cares HQ (*see Finance Policy*)
- The primary focus of each Chapter is to create a culture of philanthropy

Culture of Philanthropy

- Chapter Leadership Team and Members will build corporate relationships that serve a purpose for growth towards the overall financial and functional needs of USA Cares
- Chapter Leadership Team and Members will invite contacts to USA Cares socials and functions to spread the mission and vision to others
- Chapter Leadership Team is encouraged to identify five (5) prospects per year to recruit as Members
- Chapters will focus on growing Membership, contacts, and donor base
- USA Cares COM/HQ will establish annual fundraising support goals



Chapter Objectives

- To help USA Cares further its mission in critical geographic areas to build an across the country
- To heighten the awareness of the needs that veterans and their families face, how USA Cares responds to those needs, and outreach efforts of the USA Cares' mission and programs
- To build a culture of philanthropy
- To partner with committed Members who wish to assist with the advancement of the USA Cares' mission
- To create a community group to support local and national veterans, service members, and their families

Key Priority Indicators to Serve as a Chapter Leader

- Establish fundraising opportunities – the goal of one (1) event per quarter
- The ED will lead Monthly Chapter Meetings
- Required communication with COM on at least a bi-monthly rate, and submit monthly notes of your Chapter Meeting
- Develop corporate relationships
- Identify grant opportunities in the Chapter's local area/state and share them with COM
- Every Chapter Leader should engage in ongoing volunteer recruitment to grow their team
- Promote individual donations to USA Cares
- Forwarding/sharing/commenting on USA Cares' official Social Media messages created via LinkedIn, Facebook, Instagram, Twitter, and TikTok (*see Communications Policy*)
- Communicate with USA Cares HQ regarding event funding status (*see Finance Policy*)

USA Cares Chapter Agreement

The Chapter shall have the authority to carry out the purposes outlined in this document and to take necessary and appropriate action at the discretion given by the USA Cares Board of Directors and the President and CEO of USA Cares. It is the presumption that a Chapter will enjoy a long-term relationship with USA Cares, Inc. The Leadership Team may provide advice and comments regarding the operations of the larger organization of USA Cares, Inc. However, all executive actions for the larger corporate entity are reserved solely for its Board of Directors in accordance with its corporate bylaws and with the legal requirements under which it is organized.

Chapters in good standing with USA Cares will have – at a minimum – the following characteristics, as identified by the Board of Directors upon its periodic review:

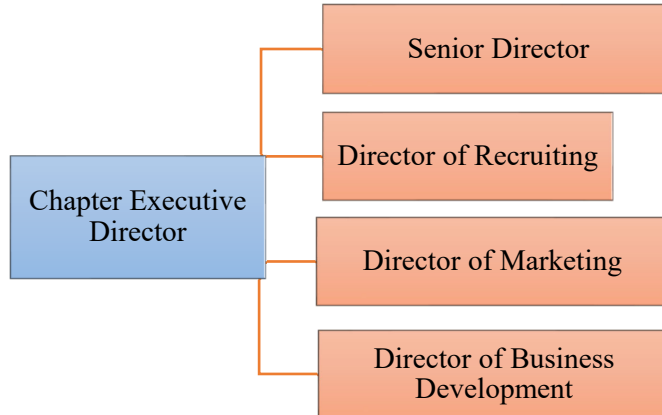
1. A history of compliance with the policies and procedures of USA Cares, Inc.



2. A history of positive contributions to the overall management and administration of the USA Cares, Inc., mission, vision, and programming.
3. A history of meeting fundraising goals.
4. A history of cooperation and collaboration with Headquarters, staff, and other Chapters.

SECTION 5 – CHAPTER TEAMS

The Chapter Executive Directors are **encouraged** to grow a cohesive team consisting of four additional (4) active members who are in good standing with the Chapter nominated by the ED for the following leadership positions:



- The **Chapter Executive Director** serves as the principal liaison with USA Cares and has lead responsibility for the Chapter’s operations. This will be outlined in the Chapter Handbook. Expectations for this position include but are not limited to:
 - Serves as chief volunteer of their USA Cares’ Chapter
 - Dedicated to recruiting leaders for the Chapter
 - Communicates bi-monthly with the National Chapters Outreach Manager
 - Provides dignified leadership to Chapter Leaders and Chapter Members
 - Chairs monthly Leadership Meetings or delegating a replacement if unable to attend
 - Serves as the guide and mediator for the Chapter concerning USA Cares’ priorities and overall objectives
 - Plays a lead role in fundraising activities, determined to meet annual Chapter goals
 - Actively engages the community as a representative of USA Cares
 - Dedicates primary leadership and fundraising duties to USA Cares
 - Provides support to the Directors of Corporate Relations and Business Development in supporting donors' acquisition and retention



The **Senior Director** will organize and lead Chapter events, fundraisers, and participation in local initiatives and communicate and encourage participation in nationwide USA Cares' initiatives and events. Expectations for this position include but are not limited to:

- Serves as the principal liaison between the Executive Director and the leadership team
- Carries out the vision and strategy for Chapter development as laid out by the Executive Director
- Provides project oversight and direction for chapter events to the leadership team
- Develops and leads the events committee
- Completes and submits event documentation to the Executive Director
- Identifies candidates for future leadership positions
- Implements at least four (4) fundraising events as laid out in the Chapter Strategy
- Communicates sponsorship, marketing, and corporate engagement needs with the Executive Director and leadership team

The **Director of Recruiting** is responsible for recruiting Chapter Members, initiating individual and corporate volunteers in the community – including Chapter Members, and developing relationships for future volunteering and individual donors. Expectations for this position include but are not limited to:

- Recruits, implements and maintains a Recruiting Committee
- Maintains documentation of all Chapter Volunteers and Donors
- Coordinates logistics for volunteer and member recruitment events
- Connects with organizations to recruit Chapter Members and Volunteers, sharing contact information with the Director of Business Development
- Encourages Chapter Leadership Team's and Members' gifts via Chapter Donation Link
- Increases brand awareness and outreach by participating in community events
- Develop and maintain relationships with educational institutions to foster future volunteers and leaders for USA Cares
- Establishes an individual donor program and identifies and engages with potential individual donors
- Convert donors to recurring donors
- Send Thank You Cards to donors upon receipt of donations and in-kind contributions (as needed)
- Provide Bi-Weekly Reporting on Individual Donor Development to the Executive Director
- Introduce, train, and deploy volunteers about and for the USA Cares Chapter
- Interview potential volunteers to identify areas they want to and can assist in, survey volunteers on availability, and conduct post-event interviews to get feedback and input on their experiences with the event



The **Director of Marketing** will organize and lead marketing efforts for Chapter events, fundraisers, and local initiatives and communicate and encourage participation in nationwide USA Cares' initiatives and marketing efforts. Expectations for this position include but are not limited to:

- Communicate with the Director of Corporate Relations to identify sponsors
- Provides the Executive Director with event details, sponsorships, and partnerships for HQ to utilize for the USA Cares Newsletter, press releases, Social Media content, and other media
- Collects photos and video content of events and initiatives and forwards them to the National Chapters Outreach Manager
- Requests QR Code creation for payment, tickets, donations, etc., with National Chapters Outreach Manager
- Documents activities involved in event formation, implementation, and results
- Establishes awareness of USA Cares' Programs and Services
- Assists with HQ national fundraising appeals (Share, Like, Repost, etc.) on all approved social media platforms
- Requests QR Codes creation with National Chapters Outreach Manager

The **Director of Business Development** will be responsible for establishing mutually beneficial relationships with organizations to identify sponsors, employee giving, in-kind partnerships, and other donor opportunities. Expectations for this position include but are not limited to:

- Recruits, implements and maintains a Business Development Committee
- Identifies grant opportunities in the Chapter's local area/state and share with Executive Director and National Chapters Outreach Manager
- Identifies and foster sponsorship opportunities for USA Cares Events
- Communicate with donors to share results from events and fundraising efforts
- Connects with organizations for sponsorship or grant opportunities
- Target sponsorships for events as requested by the Director of Marketing
- Send Thank You Cards to donors upon receipt of donations and in-kind contributions
- Provide Bi-Weekly Reporting on Corporate & Donor Development to the Executive Director
- Develop and maintain relationships with businesses to increase volunteer and leadership opportunities for them and their employees in support of the USA Cares Chapter program
- Create and offer strategic avenues for companies to support USA Cares:
 - Event Sponsorship
 - Employee Giving
 - Company Matching



- In-Kind donations
- Hiring Veterans

Additional Chapter Leadership Details

The Chapter Executive Director commits to serving a three-year term, and the rest of the Leadership Team commits to serving a two-year term and may serve additional terms if their team and COM/HQ approve it. Chapter Leadership Team Members are to be in good standing as an active participant of the Chapter, having attended at least eight (8) of the twelve (12) Chapter Leadership Meetings and three (3) of the four (4) quarterly events of the Chapter in the most recent twelve-month period.

SECTION 6 – CHAPTER MEMBERS

Non-profit volunteering is an enriching path toward enriching the lives of others and fulfills our innate desire to make a difference in the world. When you join a USA Cares Chapter as a Member, you are at the heart of our Chapter design. What does it mean to be a Chapter Member? We hope you can plug in where your talents will shine and invite you to work, attend, and support USA Cares' events.

USA Cares' Chapters Program seeks to be a 100% volunteer-giving program. As a Chapter Member, we appreciate your time donation and annual monetary gift. Member donations should be contributed through your own Chapter Donation Link to count toward the Chapter's yearly goal and are to be reported to the Member Relations & Development Leader.

The Chapter Member role is open to any individual committed to the mission, vision, and programs of USA Cares in support of post-9/11 veterans. USA Cares stands firm that its Chapters and the entire organization be diverse and free of any barriers based upon race, religion, sex, sexual orientation, national origin, age, disability, genetic disposition, or any other characteristic protected by law in any activities or operations.

SECTION 7 – FINANCE POLICY

As an added benefit for Chapters, USA Cares' VP of Finance and Programs will manage all bank accounts and maintain all financial records, including Special Event Insurance. Please see our Finance Policy below:

- Chapters work in unison with HQ under USA Cares' 501(c)(3)
- Chapter Financial Goals will be established by the end of the year for the following year by COT



- All donations received must be mailed to HQ with donor contact information (name, email address, and mailing address). *Note: Convert any cash into cashier's check – refrain from mailing cash*
- Secure forms of donations, transfer money, and obtain donor contact information, including Chapter Donation Link, QR Code, and Event Registration Page
- Venmo is unavailable for online giving or transferring of funds, as the platform is unable to issue tax-compliant receipts
- Chapters are expected to secure Event Sponsorship covering the total amount of event expenses and payment received at HQ at least 12 weeks before the event date (*see Communications Policy - Event Lead Times*)
- Events are to be executed with USA Cares as the sole beneficiary
- Event expenses will be paid directly by HQ out of event sponsorships
- COT must approve reimbursement expenses before the expense is incurred
- Receipts are necessary for reimbursement
- Invoices for events must be emailed to COM and 'cc' the VP of Finance & Programs
- All contracts for events must be sent to COM 'cc' VP of Finance & Programs – contracts can only be signed by a VP or President at HQ
- Chapter Donation Link and QR Code donations will contribute to funds raised by the Chapter. *Note: All other donations must be reported to COM before donation entry to ensure the donation will be designated to the Chapter*
- If a donation is mailed by check or cashier's check, please indicate the contact information, event, and Chapter it is associated with – inform COM of the donation
- If you know a donor is mailing a donation, direct the donor to add a note with contact information, the event, and the Chapter it is associated with, and include the Chapter Name and event, if applicable, in the Memo Line – inform COM of the donation
- USA Cares HQ strongly encourages cashless events
- Chapters are not permitted to lead raffles
- Virtual Silent Auction Events by HQ are available to Chapters – online payments required
- If any ED or individual chooses to sponsor a Chapter Event, the sponsorship rate will be pre-determined by COT, the sponsorship will be considered a donation, and will not be eligible for reimbursement
- HQ will manage all Chapter finances, including bank account and *Special Event Insurance* for Chapter Events – COM will provide *Special Event Insurance* answers to the VP of Finance & Programs

Alcohol and Food at Chapter Events

- USA Cares **does not** have an alcohol license
- If alcohol is being served at a venue that does not have an alcohol license, you must secure a vendor with an alcohol pouring license (check local laws to verify compliance)



- The Chapter Leadership Team and Chapter Members are not permitted to pour alcohol or serve food at a Chapter Event
- Due to individual state guidelines, Alcohol is not permitted in Chapter Silent Auctions unless an authorized auctioneer is conducting the auction

Chapter Event Budget

ED and COM are to discuss the Chapter Event Budget at least 4-12 weeks before the event date (depending on the event). Based on the following calculations – Projected Expenses, Projected Revenue, Miscellaneous Expenses, and Sponsorship Package (s) – COM and ED will determine sponsorship amounts/ tiers, packages, registration price(s), etc.:

Total Projected Revenue

- Sponsorship(s):
- Registration/Ticket Sales:
- Product Sales/Proceeds:
- In-Kind Donated Item(s):
- Donations:
- Miscellaneous Income:

Total Projected Expenses

- Licenses & Fees:
- Rentals (A/V, Venue, Tables, Services, etc.):
- Food/Beverage:
- Supplies/Products:
- Entertainment/Speaker Fee(s):
- In-Kind Donated Item(s):
- Printed Media & Publicity:
- Hotel/Lodging/Airfare:
- Miscellaneous Expenses:

SECTION 8 – COMMUNICATIONS POLICY

USA Cares is a thriving non-profit driven by purpose. At HQ, we understand that external brand messaging sets the tone and helps ensure public trust in our organization. Effective internal communication is vital in collaborating as a team. Our Chapter Communications Policy will navigate you through the support Chapters can expect from HQ regarding Marketing, Branding, and External Communications, as well as guide Chapters through Internal Communications, Social Media Guidelines, Media Guidelines, Newsletter Contribution Requests, and Third-Party Fundraising Policy.

USA Cares HQ will provide/manage the following:

- The right to sign all contracts (*see Finance Policy*)
- USA Cares’ posts on the following Social Media platforms: LinkedIn, Facebook, Instagram, Twitter, YouTube, and TikTok
- Responses to grievances or complaints related to or targeting USA Cares on Social Media (*see Social Media Guidelines*)



- All Media Relations (*see Media Guidelines*)
- All Chapter Event Marketing Materials and Graphic Design
- USA Cares' Newsletter
- USA Cares' Website and individual Chapter Funraise Page for donations
- ED's official USA Cares' Chapter Email Address
- ED Email Addresses will be listed on our website – email messages to Chapters will be forwarded to ED's personal email address
- USA Cares' Logo usage – past, present, and future (reserved for HQ)
- All Marketing Materials and Graphic Design, allowing USA Cares to remain consistent with brand standards and for legal protection of USA Cares' name, brand, and reputation
- Chapter Graphics and Chapter Donation Link creation for Chapters to distribute for fundraising and events – available in Virtual Tool Kit
- COM will establish Sponsorship Rates/Tiers – rates will be determined based on event expenses and logistics
- Event Promotion for Chapters: Marketing Materials, Registration Pages, Event QR Codes, Flyers, Social Media Posts, Newsletter Announcements, and Email Blasts
- Mobile Silent Auction site
- Support and collaboration with COM in determining event ideas and execution

USA Cares Chapters will provide/manage:

- Chapter Event planning and information (*see Event Lead Times*)
- Sponsorships to cover all event expenses
- Collecting Media Contact Information and informing COM for effective Press Release distribution (*see Event Lead Times*)
- Chapter Donation Link and/or Event QR Code, encouraging virtual payments at events
- Petty cash, if necessary (*see Finance Policy*)
- Distributing Flyer, Event Registration Link, QR Code, Chapter Donation Link, and Email Blast to the Chapter Leadership Team, Members, Supporters, and Event Attendees
- Silent Auction Photos (clear photos required), Item Description, and Total Item Value (*see Event Lead Times*)
- Free or In-Kind Advertisement – please provide specs to COM for HQ to create Ad/Artwork (*see Event Lead Times*)

Event Lead Times to COM

- Event Sponsor Secured – 8-12 weeks
- Event Budget Completed and Submission – 8-12 weeks
- Event Timeline Submission – 8-10 weeks



- Promotions/Flyers/Graphic Design/QR Code Request/Magazine In-Kind Ad – 6-8 weeks
- Silent Auction Info/Newspaper In-Kind Ad – 3-5 weeks
- Social Media Post Request – 2-4 weeks
- Press Release or Media Alert Request – 1-2 weeks
- Peak Dates are blocks of time surrounding HQ National Events indicating Marketing is committed – the following dates are to be considered by Chapters, as they will potentially extend Event Lead Times by the length of Peak Dates:
 - Groundhog Day Breakfast: January - February
 - USA Cares' Gala: August
 - Valhalla Golf Scramble: September

Internal Communications Guidelines

- ED commits to checking Chapter Email Daily (Monday through Friday) except on Holidays
- ED and COM will email/communicate bi-monthly, at minimum
- ED and COM will schedule monthly Zoom/Call
- Chapter Leadership Team will meet monthly
- Chapter feedback and communication with COM and HQ is vital to the health of USA Cares' Chapters *Note: A communication gap beyond one month may lead to a position replacement by HQ*

Social Media Guidelines

- The Chapter Leadership Team and Chapter Members are to be responsible, respectful, positive, professional, and politically neutral on all Social Media platforms
- As Chapters are covered under USA Cares' 501(c)(3) status, USA Cares may be held accountable for statements made by Chapter Leadership Team Members and Chapter Members – for this reason, Chapter Leadership Team Members and Chapter Members must clearly distinguish between personal opinions and organizational positions when publishing any Social Media post
- Chapter Leadership Team and Chapter Members are invited to share/forward/comment on USA Cares' official pages on the following Social Media platforms: LinkedIn, Facebook, Instagram, Twitter, YouTube, and TikTok
- Create your own post by sharing your Chapter Graphic and Chapter Donation Link (provided by HQ) – please tag @USACares in every post, as well as COM on LinkedIn



- Responses to grievances or complaints related to USA Cares on Social Media platforms will be managed by HQ – contact COM immediately with any comments or posts in question
- Facebook and other platform fundraising events are encouraged – consult COM before creating any fundraiser to ensure funds are correctly assigned to your Chapter
- As the Chapter Leadership Team and Chapter Members must work within USA Cares’ procedures, any defamation, libel, slander, or organization misinformation shared regarding USA Cares may result in position replacement and/or legal repercussions
- Any broadcast, such as LinkedIn Live, Podcast, etc., must include the same disclaimer before every broadcast: *“The views and opinions discussed in this broadcast are those of the host and do not represent the view and opinions of USA Cares, Inc.”*

Media Guidelines

- HQ will manage all Media Relations: Press Releases, Media Alerts, Newspaper Article Submissions, and Media Interviews, including, but not limited to, Webinars, Podcasts, TV appearances, and any official representation for the organization, unless express permission has been granted in writing by COM/HQ
- Any request for media coverage must be submitted and authorized by COM/HQ
- If any reporter contacts a Chapter Leadership Team Member or Chapter Member for an interview, story, or quote, please obtain the reporter’s contact information and immediately forward the request to COM

Newsletter Contribution Requests from Chapters

- Submitted 4-6 weeks before an event (*see Event Lead Times*)
- Immediately following a Chapter Event, please provide event pictures to COM
- Submit articles to COM for Newsletter consideration for Chapter Events, testimonials, Chapter Leader biographies, local veterans helped by USA Cares, etc. *Note: All articles are subject to editing by HQ*
- While all submissions to the newsletter are appreciated, selections will be based on the amount of lead time and relevance of timing. *Note: HQ reserves Newsletter editorial rights in its sole discretion*

Third-Party Fundraising Policy



USA Cares is grateful to the individuals and organizations from the community who offer to raise funds to benefit the veterans and military families we serve. Financial support from third-party fundraising is essential in supporting and expanding the USA Cares mission.

USA Cares welcomes our community's initiatives to promote awareness and funding for our programs. Since we must commit resources and services to internal fundraising, all third-party groups will assume the responsibility of creating a successful event without significant assistance from USA Cares.

As a 501(c)(3) organization, USA Cares has a fiduciary responsibility to ensure the name is used correctly, funds are handled and accounted for appropriately, and fundraising is conducted in a manner that is consistent with our mission and values.

Third-Party Fundraising: Event Promotion and Usage of USA Cares' Logo

- Communicate with COM if a third party wants to organize a fundraiser
- The third-party/group/organization holding the event must represent themselves as third-party fundraisers rather than employees of USA Cares. The third party must obtain all required licensure for solicitation for the benefit of a charitable organization
- For written permission consideration to use and produce the USA Cares logo, please submit a request via email
- USA Cares may, at its discretion, promote third-party events

Third-Party Fundraising: Event Language

All promotional materials must be explicit that the event or fundraiser will benefit USA Cares. Suggested language: "All proceeds will be for the benefit of USA Cares" or "25 percent of the ticket price will benefit USA Cares." The third-party event coordinator will be responsible for determining the value of the goods and/or services that participants may receive and shall comply with all applicable laws and with respect to informing them as such.

Third-Party Fundraising: Financial Guidelines

- The group conducting the event is responsible for payment of all expenses related to the event
- Third-party events or fundraisers will be unable to utilize the USA Cares sales tax exemption
- The date by which USA Cares will receive the donation is required



Third-Party Fundraising: Sponsorship

- Please refrain from soliciting sponsorships or In-Kind Sponsorships, such as printing or Silent Auction items
- Donor contact information is kept confidential
- USA Cares will only accept gifts from companies whose products and services support our mission and from donors whose requests for public recognition are compatible with our philosophy of appreciation
- We refrain from sponsoring or endorsing individuals, companies, programs, products, and/or services - we refrain from door-to-door selling or phone solicitation on our behalf

Third-Party Fundraising: Liability and Changes

USA Cares is not involved in planning, organizing, managing, or supervising third-party fundraising events, and the sponsors agree to defend, indemnify, and hold harmless USA Cares from all claims and liabilities in any way related to the event. The event organizer agrees to advise USA Cares of any changes in the event.

SECTION 9 – NATIONWIDE FUNDRAISING

With Chapters' goals to build USA Cares awareness in communities and states across our nation, it is built into the fabric of Chapters to actively participate in USA Cares' nationwide campaigns and events. USA Cares HQ will facilitate organizing these events, and EDs will receive information, flyers, etc., to share with the Chapter Leadership Team and Chapter Members. We want Chapters to promote the event locally, recruit participants, and raise funds using a chapter-specific URL link and a QR Code for all financial contributions (*see Finance Policy*).

Collective Opportunities with HQ include:



- USA Cares is an authorized charity in the ***Combined Federal Campaign (CFC# 12359)***. Every fall, we seek pledges in this workplace-giving program for federal employees, state employees, and retirees
- USA Cares is a beneficiary of the annual ***Hardee's/Carl's Jr. Stars For Heroes Campaign***, which takes place every year at Hardee's/Carl Jr.'s restaurants across the country
- Virtual events, such as ***USA Cares' Annual Gala*** and ***Runs/Walks/Marches***, may take place throughout the year



SECTION 10 – CHAPTER FUNDRAISING

As meeting the ongoing financial demands of the USA Cares’ Military Assistance Response Program is the main emphasis of Chapters, we appreciate the time and attention to coordinating local fundraising events and initiatives. USA Cares appreciates all you do to support our mission and serve military families in crisis.

To help you get started, below you will find a suggested list of fundraising ideas:

- Golf Scramble
- Retail Store Registering (round up to the next dollar)
- Virtual Events
- Run/Walk/March Events

USA Cares’ ED Signature Page

I hereby sign that I have read and agree to abide by the USA Cares Chapter Handbook guidelines. If I feel as if I can no longer perform the duties and communication requirements of the ED. In that case, I will release my position to COM and VP of Outreach & Development for a replacement to be selected by HQ. I will do so at the earliest opportunity to allow ample time for the transition to the new ED:

USA Cares’ Chapter Executive Director Signature & Chapter Represented

Date



Chapter Handbook Acronym Key

HQ = USA Cares' Headquarters

COM = Chapter Outreach Manager

ED = Chapter Executive Director

Chapter Leaders = 4 Chapter Leaders

Chapter Leadership Team = ED and Chapter Leaders