



Supporting\*Educating\*Building Lives

### Paladin Fundraising Events Setup

This form is to be used for all “Paladin” fundraising events. It is not for other agencies that are conducting events for funds being given to Paladin as contributions. Agency events are recorded differently on the agency general ledger for recording purposes on the agency 990 return.

Definition of Paladin Fundraising events would be an agency-sponsored golf outing, on-line sales of items for fund-raising, not for give-away items to staff or others.

**Please complete this form at the onset of the fundraiser. The CEO approval is required “in advance” of a fundraising event occurring or VP if applicable**

Form completed by \_\_\_\_\_ Name of Events Coordinator (if different from “completed by”) \_\_\_\_\_

Where Held: \_\_\_\_\_

Staff Chair of Event: \_\_\_\_\_

Email Address of Staff Chair: \_\_\_\_\_@paladin.care

Other agencies assisting: \_\_\_\_\_NA or: \_\_\_\_\_

Description of Event:

Approval Request Date: \_\_\_\_\_ CEO Approval Date \_\_\_\_\_

Event: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Specific program(s) please check below. ✓

✓	Cost Center	Name	✓	Cost Center	Name	✓	Cost Center	Name
	100	Adult Day LaPorte		105	Adult Day Lake		300	RHS LaPorte/Porter
	301	RHS Lake County		500	Therapy Services		600	Employment Services
	810	Transportation-LaPorte		880	Imagination Station		890	Head Start
	900	All Adult Programs Only		900	All ECE Programs Only		900	All Agency Programs

The #900 Admin & Support is recorded for costing purposes. The CEO or VP will let Accounting know if the event will be for a specific program or programs and it will be allocated as after the event if necessary.



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**Items needed for event:**

1. Upfront Cash \$\_\_\_\_\_ Accounting to Give to (Name of Staff)\_\_\_\_\_
2. If this will involve participant art work sales – please remember to complete the form for accounting showing the sale and if group or individual.
3. Tables Needed: \_\_\_\_\_(Approximate Number)
4. Chairs Needed: \_\_\_\_\_(Approximate Number)
5. Assistance from: Maintenance needed? If yes, maintenance request needs to be completed )it is located on the Paladin web sites/Employee Online Forms/Maintenance Request
6. Will a gaming license be required? \_\_\_yes \_\_\_no, if yes who will request? \_\_\_\_\_
7. Certificate of Insurance from company/agency/individual as for event

Financial Information when applicable

Projected Gross Revenue from Event: \$\_\_\_\_\_ Not Determined: \_\_\_\_\_(check)

Revenue from: (list sources)

- 1.
- 2.
- 3.
- 4.

Projected Expenses: \$\_\_\_\_\_ Not Determined: \_\_\_\_\_(check)

List expenses expected: (food, facility rental, printing costs, mailing, tables, chairs etc.)

- 1.
- 2.
- 3.
- 4.
- 5.

Expected Net Revenue (after expenses) \$\_\_\_\_\_ Not Determined: \_\_\_\_\_(check)



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- 8. Will a liquor license be required? \_\_\_Yes \_\_\_No If yes who will request? \_\_\_\_\_
- 9. (if yes, a police officer will be required to be at the event  
Who will contact Police Dept: ) \_\_\_\_\_
- 10. Other:  
\_\_\_\_\_  
\_\_\_\_\_

**NOTE REGARDING ALCOHOL – WHETHER OR NOT SOLD OR GIVEN AWAY:**

If Paladin is going to be the one serving alcohol, insurance requires a special event liquor liability policy in place for the day of the event. Regardless of who is serving, this type of coverage assists with covering claims of bodily injury or property damage that an intoxicated individual causes after being served alcohol. This is an excluded coverage on Paladin’s policy and most commercial insurance policies in general. For a day this coverage is roughly between \$400-\$600 at a \$2 Million aggregate limit. The event coordinator needs to inform the CFO if alcohol is being served and the Events Coordinator needs to be sure to let the insurance agent for Paladin know 1. What type of event it is and 2. If the alcohol is being provided or “sold”. The CEO or CFO can give you the current General Insurance agent’s name. This must be done in advance of the event.

If an Events Committee is requested or needed, please complete below. Please remember to check with the staff members supervisor before appointment to the committee due to work schedule or time commitment.

Name	Job(s) for Event	Days/Times Estimate

www. Addresses for the gaming permit and/or liquor license

Indiana Alcohol & Tobacco Commission

This is the current web site to get approval for liquor license

<https://www.in.gov/atc/alcohol-resources/alcohol-beverage-applications>

Here is the current site for the Indiana Gaming Commission

<https://www.in0gov/igc/>

Location of form: Accounting/Things we Share/Fundraising folder

Revised: 11-2022