



ASC BENEFICIARY PARTNERSHIP GUIDELINES

Structure of ASC

Attorneys Serving the Community (“ASC”) is a group of almost 400 attorneys who volunteer their time around career obligations, family, and other community activities to partner with a charity to raise funds year-round via several events, culminating in an annual benefit Luncheon. Our mission is to choose an organization benefiting women, children, and/or families and help take them to the “next level” in terms of funding and community awareness.

ASC is not a 501(c)(3) organization, does not maintain a bank account or hold or process any money, and does not have any permanent staff. In fact, ASC does not officially “exist” as an entity, other than self-governing via a loose structure of leadership and committees and relying upon the commitment by volunteers and their institutional memory consistently year-over-year.

Many times, the members of ASC use their personal resources to assist in preparing for the Luncheon and related events, and members are sometimes fortunate enough to utilize the resources of their firms and companies. Although our members are very passionate and committed, we rely heavily on our beneficiary to partner with us to make the Luncheon and additional revenue-generating events over the course of the beneficiary year a success. The guidelines set forth below (which are not all-inclusive) are meant to inform and guide our beneficiary as to the events we undertake on your behalf and at your side, along with some of the expectations ASC has of the beneficiary during the partnership year.

Typical Beneficiary-Year Schedule and Description of Events

ASC has developed and grown over the years since its inception in 1986. Initially, the only event ASC executed on behalf of the chosen beneficiary was a small Luncheon. Now, over thirty years later, the entire beneficiary year is packed with ancillary events – many of which generate additional revenue for the beneficiary, but all of which rely on sponsorships to ensure that ASC can raise the maximum funds possible for the beneficiary. Most recently, the typical beneficiary year schedule has been as follows:

Event	Approx. Date	Description
Charity Selection Meeting	July/August 2022	ASC Membership votes/chooses Beneficiary from among three finalist applicant presentations.
Committees Formed and Kick-Off Meeting with Beneficiary	August 2022	ASC and Beneficiary meet with CEO/Executive Director and beneficiary staff member/ASC Liaison point person (if different) to get to know each other and chart course for the year.
Monthly Planning Meetings	First Tuesday or Wednesday of each month, Sept-June	Representative from beneficiary to attend each meeting, where planning for all events and latest developments are discussed; locations vary.
ASC Membership Networking Event #1	Mid-September 2022	Fashion show at Neiman Marcus downtown; networking for ASC members and sponsors.
ASC Membership Networking Event #2	January 2023	Self-improvement speaker; networking for ASC members and sponsors; location varies.
Heart and Sole 5k and 1 Mile Fun Run	February 2023	Held at Winfrey Point on White Rock Lake; generates appx \$30k+.
ASC Membership Networking Event #3	March 2023	CLE presentation held late afternoon; networking and continuing education for ASC members and

		sponsors; location varies.
Silent Auction	Late April/Early May 2023	Location varies; generates appx \$35K+.
VIP Reception/ASC Luncheon	Mid-June (on a Friday) 2023	Final event and end of Beneficiary year; location varies; generates appx \$200k.

The main culminating event each year – and the primary source of fundraising dollars – is still the ASC Luncheon. ASC and the chosen beneficiary together may determine to alter, modify, or append to this schedule as necessary or desired in the future. ASC works hard to ensure every event is a financial success and also serves to increase community awareness for the chosen beneficiary. Ideas to enhance events are welcome.

Executive Director and Staff

Our membership is very motivated by seeing firsthand how ASC’s efforts will benefit the beneficiary and by the beneficiary putting a “face” on the organization. We ask that the Executive Director (“ED”) and/or our main point of contact person (“ASC Liaison”) attend each membership planning meeting (once a month, beginning in September until the Luncheon) and, if at all possible, bring an impacted client, who can briefly speak to the group and share success stories or critical needs.

The ED/ASC Liaison will need to be prepared for extensive email communication from the ASC Co-Chairs and committee chairs, especially as major ASC events (i.e., the 5k, Silent Auction, and Luncheon) draw near. We will need assistance proofing forms, invitations, and programs to ensure the beneficiary and donor information is correct. The staff must be prepared to update the beneficiary’s website to announce the 5k, Silent Auction, and Luncheon (on the home page); allow for online donations trackable to ASC; allow for online sponsorship, ticket, and table sales; and provide tax receipt letters for all sponsorships and donations (in-kind and monetary). We will need one beneficiary point person to include on our sponsorship forms with a dedicated phone line for the beneficiary representative, who can answer questions and receive money. The person responsible for tracking money/sponsors will maintain a spreadsheet of all donations, including ASC member dues, sponsorship, ticket and table sales, and in-kind donations, and will report to ASC monthly with weekly/daily reports needed as the Luncheon draws near. This tracking spreadsheet ultimately will be used by the beneficiary’s staff to prepare the seating charts, sponsor listings, etc. for the Luncheon, which is critical to the Luncheon’s success.

Board/Auxiliary/Advisory Board

ASC anticipates the chosen beneficiary’s Board to be very active in promoting and attending the 5k, Silent Auction, and Luncheon. We ask the Board to purchase Luncheon tables, solicit their contacts to purchase tables, sponsor the 5k, and solicit their contacts to sponsor the 5k. We ask that Board members solicit or donate items for the Silent Auction, particularly “big ticket” items such as time at vacation homes and one-of-a-kind experiences, and we strongly encourage the Board to attend the Silent Auction and bring guests who are willing to purchase Silent Auction items. We would like the Board to leverage their corporate contacts for “showcase” donations and to introduce the Luncheon and the beneficiary to businesses outside of the legal community. We like as many Board members as possible to attend the Luncheon and the VIP reception immediately preceding the Luncheon. We expect the Board to give or get \$50,000 in sponsorships and in-kind donations.

Assistance Leading Up to the Luncheon

The beneficiary will be responsible for paying any deposits for the Luncheon speaker, hotel, audio/visual equipment, or other up-front fees. The beneficiary should expect that most of the funds raised by ASC are received in the 1-3 months leading up to the Luncheon and, therefore, may not be available to cover such

fees in advance. Although we try to negotiate the best deal we can for printing, fulfillment services, and mailing, the beneficiary may need to pay the costs for these services. The beneficiary also may need to have an updated video produced that fits within the time constraints of the Luncheon (typically less than 7 minutes).

ASC typically uses a speakers' bureau to assist in selecting a speaker, but the beneficiary should be prepared to participate in identifying potential speaker candidates. The beneficiary should also be prepared to locate an honorary chair – someone important to the beneficiary's cause, with a strong local presence and who is willing to monetarily support the beneficiary and Luncheon and ask their contacts to do the same.

At the Silent Auction, volunteers will be needed to help with the set-up and check-out process. Similarly, the beneficiary will need to supplement ASC's volunteers prior to and on the day of the 5k in order to assist with putting flyers on cars at other 5k races earlier in the year, parking on the day of the event, monitoring the course, assisting with stuffing/handing out goody bags and finishers items, and general clean up. Credit card capability/volunteers will be needed at the Silent Auction, 5k, and Luncheon for day-of attendee purchases.

Day Before/Day of Luncheon

Many volunteers will be needed the night before and day of the Luncheon. The ED/ASC Liaison should be prepared to go to the location (typically a hotel near downtown Dallas) the day before the Luncheon to meet with the ASC Co-Chairs, finalize last minute details, and prepare the seating chart. This meeting can run late into the evening.

Many volunteers are needed the night before the Luncheon to finalize and place centerpieces, stuff swag bags (if applicable), help set tables with programs and promotional materials, and help with general set-up. The hotel typically allows us to begin setting up at 6:00 pm or earlier on the night before the Luncheon, so this effort may run late into the evening. In some years, set-up must take place on the morning of the Luncheon and, if so, even more volunteers will be needed in the early morning to quickly get things in place. Volunteers from the beneficiary (around 10-15) are needed the day of the Luncheon to staff the check-in tables; to staff the centerpiece purchase station, which requires credit card capability; and to staff book-signing tables, if applicable and which also requires credit card capability. Some of these tables must be staffed even during the Luncheon.

Additional volunteers – preferably clients that the beneficiary serves – are highly desired during the Luncheon to help collect day-of donation envelopes from attendees. We encourage clients of the beneficiary to attend the Luncheon and often ask a client to speak briefly during the Luncheon. After the Luncheon, we always invite the ED/ASC Liaison, and any staff or volunteers who wish to join us, to remain for the “counting of the money” (the fun part!) received from centerpiece sales, donations from the floor, walk-in ticket purchases, and book sales.

Reporting Following Luncheon

Following conclusion of the beneficiary year, we ask that the ED/ASC Liaison arrange for a final accounting of all income and expenses, including details broken out by event and a full list of sponsors for each. The beneficiary and ASC leadership typically have a final small event together to celebrate the years' partnership.