

DRI Planning Guide and Timeline for DRI Care Projects

The DRI Foundation is supported by and promotes the work of its volunteer-led committees, including DRI Cares and DRI For Life and is a 501(c)(3) charity. DRI Cares helps its members engage with local communities through fundraising and volunteer activities. DRI For Life helps its members lead healthy, balanced, and productive lives through wellness activities, support programs, and mentoring.

Examples of programs supported by the DRI Foundation include the following:

- Community service projects like packing backpacks, making care packages, stuffing teddy bears or making cards
- Healthy living programming and activities at seminars and other events
- Disaster recovery projects
- Support for the judicial system
- Promoting and supporting diversity initiatives
- Philanthropic fundraisers

Each DRI seminar strives to have DRI Cares and DRI for Life components in its program. In order to develop and execute successful DRI Cares projects, the following timeline and guidelines should be considered:

7 months before the seminar:

- The Committee Chair or Program Chair identifies the DRI Cares Chair and Vice Chair assigned to organize the DRI Cares project at the seminar.
- DRI Cares Committee leadership and staff liaison will join a programming call to discuss the DRI Foundation & DRI Cares guidelines for DRI Cares events.
- DRI does not currently have a DRI Cares Partner like Blessings in a Backpack so SLCs are encouraged to identify a DRI Cares project in the city of their seminar.
 - o SLCs do not need to fundraise for these events. The DRI Foundation will provide up to \$1,500 for supplies for a DRI Cares seminar project.
 - o DRI can provide a list of past projects to spark ideas for new DRI Cares projects
 - o The SLCs are responsible for identifying a group of volunteers to help with the project set-up.
 - o The projects are currently scheduled (in most cases) just before the networking lunch.
- Guidelines for selecting other DRI Cares organizations include:
 - o DRI Cares events should not benefit a specific individual or any religious or political organization.
 - o Preference should be given to selecting organizations whose missions are consistent with DRI's mission and/or the Committee's work.
 - o DRI has a list of suggested organizations for the Committee's consideration, if needed.

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5 months before the seminar:

- Submit [DRI Cares Approval Form](#) on the DRI Foundation website. DRI Staff will share all proposals with the DRI Cares Committee Chair. Approval of the organization selected by the Committee may take up to a week.
- The Committee must choose what the event will be – a service project, a fundraiser or both.
 - For a SERVICE PROJECT:
 - Service projects would include things like packing backpacks for a charity, creating cards or care packages, stuffing teddy bears, serving meals, organizing items for nonprofit facilities or other similar events. Should a Committee decide to conduct a service project on site at the seminar location, DRI Staff will assist in identifying adequate space at the hotel.
 - The Committee will need to determine the cost of the project including what needs to be purchased for the project and from where the items would be purchased.
 - For a FUNDRAISER:
 - The Committee will set a monetary goal for the Committee donations for the chosen charity. The DRI Cares Committee member will then complete and submit the DRI Cares Fundraiser Approval form. All donations should be made through the DRI Foundation webpage by selecting the Committee hosting the project.

4 months before the seminar

- Approved DRI Cares event summary will be posted on the seminar website.
- Begin marketing the DRI Cares project or fundraiser along with marketing of the seminar.

1 month before the seminar

- The DRI Cares Committee member will submit the final service project shopping list to DRI Staff. Staff will purchase the items identified on the project approval form and arrange for shipment of all materials to the seminar hotel.
- If needed, DRI staff will create a Sign-Up Genius form to recruit volunteers for the DRI Cares project.

On-Site During the seminar

- DRI Staff will coordinate with the DRI Cares Chair to assist with project completion.
- If the Committee is doing a fundraising project, you should continue raising money to meet/exceed budget during the seminar.

Immediately after the project

- The DRI Cares Chair will provide the following information to DRI Staff:
 - Date of the project:
 - Committee Name/Seminar Name:
 - Charity/Organization Benefited:
 - # of hands-on participants:

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- o Project results (# packets stuffed, # cards made..., etc.)
- o Photographs (if any) taken during the project

1 week after the seminar

- The DRI Cares Chair or other committee member will submit a short article about the project with pictures (if possible) to submissions@DRI.org. The article will be included in the next edition of *The Voice* and may be included in other publications as well.

After the seminar

- Service Project - DRI will reconcile all costs and expenses from the event and share the total impact of the project.
- Fundraiser – Staff will send the fundraising report to the Committee for review. After the Committee signs off on the report, staff will submit a check to the charity.

Frequently Asked Questions:

Q: Will there be a list of suggested organizations to choose from? How many?

A: Yes, DRI will have a list of suggested organizations that Committees may choose from, or Committees may choose an organization on their own, subject to DRI approval and submission of the appropriate forms on the DRI website.

Q: If multiple Committees are having their seminars co-located, should the Committees choose the same charity to benefit for the DRI Cares events?

A: Committees are encouraged to work together to make a bigger impact for an organization located near the seminar or a nationwide organization.

Q: If Committees do choose to benefit the same charity, can we have a competition? Will DRI be able to tell which Committee won?

A: Committees are welcome to have some friendly competition to benefit the philanthropic goals that have been set. Because donations for all DRI Cares events are being made through The DRI Foundation website, DRI will be able to share exactly what each Committee raised and, more importantly, at the end of the year DRI as an organization will be able to share the overall philanthropic impact made collectively by all DRI Cares initiatives.

Q: Will DRI fund a prize for the winning Committee?

A: “Winning” Committees will have full bragging rights.

Q: How will we know what needs to be purchased for the project?

A: The Seminar’s DRI Cares Chair will have the role of working with the approved organization to determine what is needed, how many of each item is needed and where it should be purchased. If there are no preferred vendors, everyone loves a good Amazon shopping spree, so costs and items can be sourced there as well.

Q: Do I need to use my personal or firm credit card to buy the items for the project?

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A: NO! Once the charity, project and budget are approved, DRI will purchase all the necessary items from the shopping list created by the Committee in the project approval form and will have the items shipped directly to the seminar hotel.

Q: Our fundraising efforts were not as successful as we hoped, and we only raised \$500 of our \$1000 goal. Will our chosen charity only get the \$500 we raised?

A: Yes, the charity will receive the actual amount the Committee raised. Committees that are unable to reach their fundraising goals, may have smaller, less ambitious projects approved going forward.

Q: Our Committee and our seminar are both small. Do we have to do a service project?

A: DRI would like to encourage all seminars to host a DRI Cares event. It could be a service project or a simple fundraiser. Regardless of which event the Committee chooses, DRI will still share with the Committee the results of its philanthropic efforts for the approved organization chosen by the Committee.

Q: If we are only doing a fundraiser, do we still need to complete the approval form seeking approval of our event?

A: Yes, even if you are doing a fundraiser instead of a project, the Committee will need to complete the DRI Cares Approval form. It is very short and simple. The form helps The Foundation with budgeting for all DRI Cares events held throughout the year.

Q: If I make a donation to a DRI Cares project through the DRI Foundation on the DRI website, will I get a receipt? Will it have the charity's name that my Committee supported in the DRI Cares project?

A: Yes, you will receive a receipt for the charitable donation, and it will show the donation was made to the DRI Foundation. As described above, this allows DRI and The DRI Foundation to measure and celebrate the philanthropic causes our organization is supporting. DRI is excited to see, as an organization, how big of a difference our members make in the communities we visit with our seminars.

Q: Can my law firm make a donation to the DRI Foundation in support of our project/fundraiser?

A: Yes. The DRI Foundation accepts donations from law firms. Please note that to avoid confusion with DRI's seminar sponsorship program, we are not able to recognize DRI Foundation law firm donors on-site at our seminars. The firms are encouraged to promote their involvement through their social media.