

Donation Eligibility Checklist

Work out whether your group qualifies before you spend an evening on request forms - eligibility by organization type, the documents programs commonly ask for, and the honest routes open to groups without their own 501(c)(3).

Checklists · ultimatedonations.org/resources/donation-eligibility-checklist

About seven in ten donation programs in our directory historically indicated 501(c)(3) documentation was required or requested. No law requires that status to ask for a donation - but that pattern is why the eligibility question is worth settling before you fill in a single form, not after.

This checklist is descriptive. It sets out how eligibility has typically played out for common fundraising groups, what documents programs commonly ask for, and what the honest routes are when your group does not hold its own exemption. *It is informational, not legal advice - rules vary by state and by program, so check with your school district, league leadership, or a qualified advisor about your own situation.*

Step 1: identify your organization type

Find your group in the table. The right-hand column describes the typical situation, not a ruling on your organization.

Organization type	Typical situation
501(c)(3) nonprofit	The most straightforward case. A determination letter and EIN satisfy what most programs ask for, and eligibility questions rarely go further.
PTA or PTO	Parent groups describe two arrangements: a PTA whose status comes through its state or national PTA organization, and an independent PTO holding its own 501(c)(3). Which applies to your group is a question for your own state PTA or your board, and programs serving parent groups commonly expect one of the two.
Booster club	Many booster clubs incorporate and obtain their own 501(c)(3). Clubs that have not commonly route requests through the school, a district foundation, or their league when documentation is requested.
Public school	Often accepted without a separate 501(c)(3); many programs treat public schools as eligible in their own right, though some forms still ask for a district tax ID or a letter from an administrator.

Organization type	Typical situation
Church or faith group	Churches are generally treated as tax-exempt without applying for a determination letter. Many programs accept them, though some still ask for written proof such as a tax ID or a denominational listing.
Informal community group	Usually holds no tax-exempt status at all. These groups commonly partner with an established nonprofit, school, or church, or focus on local asks and programs whose pages indicate broader eligibility.

For a fuller treatment of what the status is and how groups without one have historically fared, see [do you need a 501\(c\)\(3\) to get product donations](#).

Step 2: gather the documents programs commonly ask for

Collect these once, keep them in one folder, and every later request becomes a copy-and-attach job rather than a scavenger hunt.

- **IRS determination letter.** The document recognizing tax-exempt status, if your group holds one.
- **EIN or tax ID number.** Asked for on most forms, often in the same field as the determination letter.
- **Letterhead.** Many programs ask for the request itself to be on your organization's letterhead.
- **Event details in writing.** Name, date, purpose, expected audience, and what the funds support.
- **A named contact.** One person with a phone number and email who can answer a follow-up question quickly.
- **Mailing and delivery address.** Where a physical item should go, and who will sign for it.
- **A W-9, if you have one.** Some programs request it before sending anything of value.
- **Proof of affiliation.** For a team, troop, or club operating under a larger organization, whatever shows the relationship - a charter, a league roster, a letter from an administrator.

Programs vary in what they require, and a page that lists requirements is describing that program's history, not a universal standard. Our overview of [what companies require before they donate](#) covers the usual set.

Step 3: check the request against the program

Before you spend an evening on a form, run these questions against the specific program. Any "no" is a signal to shortlist a different company rather than to push harder.

- Does the program's page indicate it serves groups like yours?
- Can you supply every document the form requires, without borrowing anyone's status?

- Does your event date leave the notice the program asks for?
- Is the item you are requesting the kind of thing this program has historically given?
- Is the request going where the program actually accepts requests - its form, its email, or a local manager?
- Have you recorded the date sent and a follow-up date?

Each company's page in our [donor directory](#) describes what its program has historically offered and where to check its current status. With 4,000+ companies tracked, filtering to the programs your group can actually complete is faster than working alphabetically through the ones it cannot.

Step 4: if your group is not a 501(c)(3)

Three routes come up constantly in how school-adjacent and community groups describe fundraising without their own exemption.

1. **Request through an established umbrella organization.** A PTA, school foundation, booster organization, league, or chartering body that already holds recognized status makes or co-signs the request and formally receives the donation, while your group runs the event. Ask first and get the arrangement in writing: the organization's name and tax ID are its own to lend, and only it can decide to do so.
2. **Target programs whose pages indicate broader eligibility.** Some programs describe eligibility in wider terms - schools, youth programs, community organizations - rather than requiring a determination letter. Shortlist those instead of burning evenings on forms that end at an upload box you cannot fill.
3. **Keep the asks local.** Requirements are strictest on national online forms. Local asks are commonly decided by a person rather than a form, and a short written request explaining who you are, what the event supports, and how the community benefits often carries more weight locally than paperwork does.

Be plain about what your group is and is not. A program that only serves determination-letter nonprofits is not rejecting you personally, and there are plenty of programs that cast a wider net.

Step 5: keep the answers where you can find them

Fill this in once and reuse it on every form.

Detail	Your answer
Legal organization name	
Organization type	
EIN or tax ID	

Detail	Your answer
Determination letter on file	
Umbrella organization, if any	
Written permission on file	
Primary contact and phone	
Delivery address	
Event name and date	
What the funds support	

Once the sheet is complete, move on to the [donation request letter workbook](#) for the wording and to the [donation request timeline planner](#) for when to send. The rest of the library lives at [free fundraising resources](#).

This checklist is informational, not legal advice.

Common questions

Do you need a 501(c)(3) to receive product donations?

No law requires one to ask, but about seven in ten donation programs in our directory historically indicated 501(c)(3) documentation was required or requested, so options narrow without it. This is informational, not legal advice.

Can a booster club or team use its school's or league's tax-exempt status?

Groups commonly describe doing this, with the school or league formally making or co-signing the request and receiving the donation. Using another organization's name or tax ID is that organization's decision to make, in writing, before anything is sent. This is informational, not legal advice.

Do companies check nonprofit status?

Many do. Programs commonly ask for a determination letter or tax ID, and some check public records, though verification practice varies by company and by program. What any particular program requires is described on its own page, and this is informational, not legal advice.