

# MyCommunity Fundraiser

## Planning Kit

How to make your fundraiser a success!



# CONTENTS

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## **Introduction**

Welcome

UF Health Mission

## **Resources**

Definitions

Promotional Material

Policies & Procedures

Fundraising Procedures

Fundraising Tips

Keys to Success

Reaching Out

Final Recommendations

# Welcome!

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Thank you for choosing UF Health to benefit from your fundraising event! We've designed this toolkit to provide tips and resources to promote your event and make it a success. You will find information about how to market your event, work with the media and more. We have also included some important definitions, policies and procedures and fundraising tips.

## Mission Statement

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MyCommunity Fundraiser Events should fit the UF Health mission and promote the appropriate image for UF Health.

Our mission is to provide excellent patient care; collaborate in improving community health; and support education and research in the health sciences. UF Health is committed to delivering essential care to residents in North Florida communities; offering advanced diagnostic and medical services for regional patients; and pioneering and providing sophisticated treatments that draw patients nationally for highly specialized, complex care.

# Definitions

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MyCommunity Fundraiser Events are any special event or program hosted by an outside organization, business, individual or group that will raise funds to benefit UF Health. All events are classified as either Community Associate or Partner.

A **Community Associate** event is fully managed by the outside organization including event management, income and expenses, and one collective payment for the proceeds is provided from the organization to UF Health following the event.

A **Community Partner** event is partially managed by the UF Health Office of Development including event management, income processing, expense tracking and publicity assistance. Events are classified as a *Community Partner* on a case-by-case basis and are able to show a history of success by receiving a net profit of \$10,000 or greater.

# Promotional Material

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UF Health Communications reserves the right to review all promotional materials where the UF Health name or logo is present (including, but without limitation to: press releases, public service announcements, scripts, posters, brochures) before they are used. The logos of the University of Florida, Shands Teaching Hospital and Clinics, Inc. and all of their programs and entities are registered trademarks and cannot legally be reproduced without written permission.

Any promotional materials must expressly state that your event is raising funds to benefit UF Health and properly characterize the use for which the donation will be made. For example, “Proceeds benefit UF Health Shands Children’s Hospital.” However, publicity may not imply that the event is sponsored or co-sponsored by UF Health. For example, the name of the event cannot be “UF Health Shands Children’s Hospital Marathon for Kids.” Instead, it should be “Marathon for Kids to benefit UF Health Shands Children’s Hospital.”

Please contact the Office of Development with any questions regarding promotional materials.

Jordan Regar  
Public Functions Manager  
352-294-5753  
jper0007@shands.ufl.edu

# Promotional Material

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Standard services, provided for all events, include advertisement within the hospital (i.e. Employee Newsletter), calendar listing on Giving.UFHealth.org and promotion through the UF Health Office of Development Facebook page.

The UF Health Office of Development can provide assistance to *Community Partners* to promote the event. To request assistance, complete and return the Office of Development Support form at least 6 months prior to the event. By submitting this form, you are requesting assistance; services cannot be guaranteed prior to the written approval of services provided in the MyCommunity Fundraiser Events Agreement.

Events classified as *Community Partner* may also select from the following services, based on availability and approval:

- o Ticket Purchasing/Registration Page
- o Tax Receipts and Acknowledgement Letters
- o Use of UF Health Posters/Banners
- o Press Release
- o Media Promotion/Advertisements
- o Giveaway Items (pens, stress balls, etc.)

A request can be submitted for UF Health VIP attendance at the event on the Office of Development Support form, including detail of the role he/she will serve and the timeframe during which their attendance is requested.

Attendance cannot be guaranteed.

# Policies & Procedures

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UF Health has a fiduciary responsibility to ensure that the UF Health name is being used properly, that funds are being handled and accounted for in a responsible manner, and that fundraising is being conducted in a manner that is consistent with our mission and public image. Fundraising events must comply with all relevant state and federal laws.

All fundraising events require written permission from the UF Health Office of Development in advance. Do not make public announcements or promote the event until you receive a Community Fundraising Events Agreement.

You agree to indemnify and hold harmless UF Health, UF Health Office of Development and Shands hospitals, clinics and programs and all its officers, directors, and employees from any and all claims and liabilities in any way related to the event.

You must immediately advise UF Health Office of Development of any changes in your fundraising event.

You are responsible for furnishing event liability insurance for all activities as applicable. For Community Partner events where UF Health is managing contracts and expenses, you must list UF Health as additional insured and provide a certificate of insurance, if applicable.

Events may not be hosted on the UF Health campus.

There may be times when, if circumstances warrant, a fundraising event must be canceled. UF Health, through any of its directors, officers, senior administrators or employees of the Office of Development, retains the right to cancel the fundraising event. You hereby agree to cancel the event, if so directed, and further agree to release UF Health, UF Health Office of Development, Shands hospitals, clinics and programs and its officers, directors, and employees from any and all liability in connection with such action.

# Fundraising Procedures

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## *Community Associate*

UF Health cannot solicit sponsors (cash or in-kind) for your fundraising event and will not provide any donor or patient family contact information. Event participants make payment directly to the *Community Associate* organization. Following the event, one collective payment for the proceeds is provided from the organization with the completed Donation Records form. The Donation Records Form should have all information (name, address, phone, email, donation amount) for each donor. Individual donors will not be recognized or credited for the contributions.

Any exception to the above will require written approval. If an exception is made, checks should be made to Shands Healthcare or University of Florida Foundation (you will be instructed on which one to write) with the event name on the memo line, and all checks should be sent in one package with the completed Donation Records Form. For IRS tax deductions, receipt letters can only be sent to checks written to Shands Healthcare or University of Florida Foundation.

Within 30 days after the last day of the event, please send the Donation Records form and check made payable to Shands Healthcare or University of Florida Foundation to:

UF Health Office of Development  
Attn: Jordan Regar  
PO Box 100386  
Gainesville, FL 32610

## *Community Partner*

UF Health cannot solicit sponsors (cash or in-kind) for your fundraising event and will not provide any donor or patient family contact information. However, the UF Health Office of Development will process donations and income for *Community Partner* events. Events classified as a *Community Partner* are able to show a history of success and receive a net profit of \$10,000 or greater.



# Fundraising Procedures

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*Community Partner Continued:*

Procedures for processing donations and income:

- o **Checks** - Checks should be sent to the UF Health Office of Development for deposit. Do not hold checks for any period of time. Your representative from the Office of Development will work with you on depositing the funds in the appropriate fund. For IRS tax deductions, receipt letters can only be sent to checks written to Shands Healthcare or University of Florida Foundation (you will be instructed on which one to write), with the event name on the memo line.
- o **Cash** - A receipt must be given for any cash received. Cash receipt books may be obtained from the Office of Development. Each receipt should be signed by the donor and the UF Health employee receiving the funds. Cash needs to be hand delivered to the Office of Development as soon as it is received. A representative will count the funds with the department's representative and then deposit in the appropriate fund. If a tax receipt is requested, please be sure to get donor's contact information.
- o **Credit Cards** - The best procedure for accepting credit cards is an on-line donation or ticket purchasing page on [giving.ufhealth.org](http://giving.ufhealth.org). Credit Cards may be used at events via credit card machines issued by the Office of Development. ***Please DO NOT make copies of credit card numbers for your own records.***
- o **In-Kind** - In-kind donors should be acknowledged for their contributions. However, the value of in-kind donations from sponsors should not be included in your total event revenue. Please complete an In-Kind Donation form for each contribution-- contact name/business name, address, product description and value are required.

# Fundraising Procedures

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## *Important Reminders:*

- o **Fair Market Value (FMV)** - Donations are tax deductible for the donation amount minus any goods or services received by the donor. Please be sure to communicate to the Office of Development any services given in exchange for ticket purchases or donations. For example, a ticket to your event costs \$50.00. By purchasing a ticket, the attendee will receive a t-shirt (value: \$10) and lunch (value: \$10). The \$50.00 ticket minus the \$20.00 value of goods, provides the purchaser with a \$30.00 tax-deductible donation.
  
- o **Copies** - Protection of donor information is very important. Please DO NOT make copies of any credit card slips or checks for your own records. Documents could get lost and cause a breach of personal information.
  
- o **Sales Tax** - If you are selling items (i.e. t-shirts, etc.), sales tax must be collected in addition to the sale price of the item. Be sure to charge the appropriate tax amount for your county. Visit [http://dor.myflorida.com/dor/taxes/sales\\_tax.html](http://dor.myflorida.com/dor/taxes/sales_tax.html) to learn more about state guidelines and requirements.
  - **Auctions-** Sales tax must also be applied to all physical items with a retail value sold in an auction.
  
- o **Games/Raffles-** For any game that attendees/participants have paid to enter and there is a chance to win a prize (i.e. raffle, competitive prizes, etc.), each winner must complete the IRS Form 5754. Information regarding this form, as well as the complementary W-2G form, to be completed by the payer, can be found here: <http://www.irs.gov/uac/Form-5754,-Statement-by-Person%28s%29-Receiving-Gambling-Winnings>.
  - *Community Associate Events* should follow all guidelines outlined in the instructions. (<http://www.irs.gov/pub/irs-pdf/iw2g.pdf>)
  - *Community Partner Events* should submit all forms directly to the Office of Development.

# Fundraising Procedures

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## *Expenses*

UF Health cannot advance moneys or provide tax-exemption for event related expenses. Event expenses must be less than fifty percent (50%) of the total amount raised, excluding in-kind donations. Prior approval is required for expenses greater than 50%.

The Office of Development will process expenses and invoices for *Community Partner* events. Invoices should be sent to the Office of Development for payment. Vendors must include their Tax ID number for the invoice to be processed. Original invoices are due in the Office of Development by Monday afternoon. Pending all information is included; the invoices will be processed and sent to accounting by Tuesday morning for payment by the end of the week. Please keep this timeline in mind when discussing payment conditions with vendors, as this exceptions cannot be made.

# Fundraising Tips

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- o **Brainstorm creative, unique ideas** – avoid copying an event that is already done in your community.
- o **Identify your audience** – who do you want to attend this event, and what will interest them.
- o **Planning committee** – involve enthusiastic volunteers whose dedication and hard work will make the event a success.
- o **Choose the right event** – decide on the right event that best uses the talent and skills of volunteers and interests your target audience.
- o **Plan a budget** – establish measurable, realistic goals and keep expenses low to raise the maximum funds.
- o **Reach out for support** – get creative in the ways you will raise funds, including sponsorship, raffles, silent auctions, etc.
- o **Promote your event** – get the word out by publicizing your event as much as possible through various resources.
- o **Thank you!** – the most important part – recognize and acknowledge everyone who has a hand in the success of the event, from volunteers to sponsors.
- o **Plan for next year** – make notes for improvements, set the date and let your participants know as soon as possible.

# Keys To Success

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## **Set a purpose:**

Sit down and write out your general objective. For example, is it to raise money, spread awareness, recruit volunteers, or to honor or recognize an occurrence, significant gift or individual(s)? Establishing a clear goal is the first step to any successful event.

- Sample Objective: To raise awareness and funds for pediatric cancer patient care.

## **Do your research:**

When you explore different fundraising ideas, be sure to consider location, the season, how many participants you want (or have the capacity) to involve and the resources that are available to you. Check online calendars (i.e. [www.events.gainesville.com](http://www.events.gainesville.com)) and news announcements to avoid scheduling your fundraiser at the same time as another related event.

- TIP: Event attendance is typically highest on Saturdays.

## **Form a committee:**

Gather a group of individuals who can not only help you with planning, setting up and operating the event, but also with reducing costs through special services and in-kind donations.

- Committee members can include volunteers with nonprofit fundraising experience, or anyone who supports your mission and is willing to solicit and fundraise.

## **Make a budget:**

Create a list of expenses for your event and categorize them into sections, such as printing, venue rental, décor, entertainment, catering and transportation. Make sure to add a section of unforeseen costs to ensure you will not go over budget. A budget should be one of the first items on your to-do list.

- Use a template, like the Microsoft Office fundraiser event template, or an organized system that will help you monitor the ongoing expenses.

## **Plan Ahead:**

Early on, consider all of the details like ticket sales, programs, itineraries, donation processes, etc. Give yourself a deadline for when these details need to be finalized. Devise a social media/email schedule to spread awareness early on and throughout your planning. And lastly, perform at least one walk-through/rehearsal, where you run through the event to fill in any holes or gaps.

- TIP: HootSuite is a free and user-friendly social media management tool that allows you to schedule messages and tweets from multiple networks. [www.hootsuite.com](http://www.hootsuite.com)

# Reaching Out

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## **Word of mouth:**

The simplest way to generate buzz is to tell your friends, family, coworkers, neighbors, etc.—and then ask them to pass along the information.

- Offer discounts to those who purchase more than one ticket, or provide an incentive for the top referrer/fundraiser.

## **Create a blog:**

Blogs are a free and easy way to get people excited about your event. Post updates of logistics, like the number of tickets sold or the progress of the set up. Use this platform as a way to tell people about why this cause is so important to you. Share your personal story.

- Check out Dance Marathon's blog at <http://dmatuf.tumblr.com/> for a great example.

## **Social media:**

Make a Twitter and/or Facebook page to not only update followers and friends, but to also hold promotions and contests. Have small incentives available, such as giving the first five people to “like” your page a T-shirt or other small prize.

- Visit Dance Marathon's Twitter account at [www.twitter.com/floridaDM](http://www.twitter.com/floridaDM) and Facebook account at [www.facebook.com/fldaDM](http://www.facebook.com/fldaDM).

## **Have it in print:**

Give people a point of reference they can hold onto—create a brochure or flier that includes the time, location, activities and information on the cause. Have them available to hand out, and also post them at local community spots like schools, churches, stores and parks. See sample fliers on the following pages.

- TIP: Remember to send your marketing materials containing the UF Health name or logo to the Office of Development for review at least one week prior to print/publication.



Spirit Halloween

Your child's Halloween costume can help other children in need! Here's how:

- 1 Visit Spirit Halloween in Ocala or Gainesville or visit online at [spirithalloween.com](http://spirithalloween.com) by Oct. 20, 2013.
- 2 Receive 10 percent off your entire purchase with printed coupon or with online coupon code: HELPING
- 3 **Spirit Halloween will match your 10 percent savings with a donation to the UF Health Shands Children's Hospital Child Life Program.**

**Spirit Halloween in Gainesville:**

Millhopper  
4119 NW 16th Boulevard  
Gainesville, FL 32605

**Spirit Halloween in Ocala:**

Ocala West  
2400 SW College Road  
Ocala, FL 34471

**Thank you for your support!**



PANERA GOES  
**PINK**

**Friday, October 4th**



100% of the proceeds from every Pink Ribbon Bagel sold will be donated to UF Health - The University of Florida Health Cancer Center



[www.panera-tampa.com](http://www.panera-tampa.com)

Download the pre-order form at <http://giving.ufhealth.org/panera/>



# Reaching Out

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## **Register your event:**

Remember the sites you used to research other events? Register your event as early as possible, and include when and where your event will take place. Make sure to link your blog, media sites or homepage in this listing.

- TIP: If you need to do online registrations for your event, Eventbrite is a useful website.

## **Form Partnerships:**

Contact other event hosts and help cross-promote one another. You can list their event on your pages, and they can do the same for you. This is a great way to get advice, help and, most of all, a larger audience.

- Tip: You can also cross-promote with any corporate partners/sponsors your event has acquired. For example, a Facebook share could include: “Our title sponsor, The Gainesville Business, has generously donated two \$50 gift certificates toward the fundraiser. Be the first to like and share this post and receive a gift card!”

# Final Recommendations

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## Event Day Tips

- Devise a clean-up plan before the event begins. Ensure that you have scheduled some volunteers to help with this task once the event is over.
- Make sure you arrive early to set up, put out signage and handle any unforeseen issues. If your event is indoors, now is the time to adjust the room temperature and locate all of the exit doors and restrooms.
- Consider how attendees will identify volunteers (name badges, T-shirts, etc.)
- Make sure you or a head volunteer is easily accessible for questions or concerns from volunteers or event attendees.

## After the Event

- Immediately following the event, round up volunteers to not only thank them but to also debrief them on their efforts. Let them know what was successful and relay any positive feedback or compliments you received during the event (for a lengthier debrief, consider sending an email or planning a follow-up meeting.)
- Update your attendee list to reflect no-shows or last-minute registrants.
- Review all of your invoices to avoid any outstanding bills.
- Evaluate the event to consider what worked and what could have been done differently, etc.
- Reach out verbally or electronically to get feedback from attendees. This is a great way to prepare for any future events. You can also ask service providers for their feedback, as they typically work events.
- Thank everyone! Send emails or handwritten notes to thank all sponsors, attendees and volunteers. This is ideally done within the 48 hours following the event.
- Send a press release to local media updating the community on the success of your efforts.
- Remember to send your check within 30 days to the UF Health Office of Development.

UF Health is a collaboration of the University of Florida Health Science Center, Shands hospitals and other health care entities.

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