



# Community Fundraiser Resource Kit

Giving back, hosting a charity event  
to support Regions Hospital

# Getting Started

**HELLO!**

Thank you for your interest in hosting an event to benefit the health and well-being of our community through Regions Hospital Foundation (RHF).

Regions Hospital Foundation is a nonprofit organization that raises millions of dollars annually for the benefit of Regions Hospital. Gifts made to Regions Hospital Foundation are more than just gifts of dollars—they are gifts of hope, caring and of purpose. The proceeds from your event will help provide programs, equipment and services the hospital could not otherwise offer to patients.

**1**

Take the time to fully read through this tool kit. In this tool kit you will find important information regarding:

**HOSTING AN EVENT  
EVENT PROMOTION**

**FINANCIAL GUIDELINES  
PROPOSAL FORM**

**2**

Complete the fundraising proposal form and return it to Regions Hospital Foundation at [RHF@healthpartners.com](mailto:RHF@healthpartners.com). Please allow up to three week for proposal review. Once approved you can officially start planning your event.

**3**

Schedule a time after your event for a check presentation and public tour of Regions Hospital. Contact Regions Hospital Foundation at 651-254-3864 to schedule your visit.

**MISSION:**

To improve health and well-being in partnership with our members, patients and community.

**VISION:**

Health as it could be, affordability as it must be, through relationships built on trust.

# Gather a Team and Create a Plan

## START EARLY!

Beginning to plan your event 9-12 months in advance is a great way to help your event succeed.

## CREATE A COMMITTEE

The first thing you will want to do is gather a group of individuals who have a passion for your cause and will commit to follow-through to make the event a success.

### A committee can help in many ways:

- A committee can help you brainstorm and come up with good ideas.
- Committee members can network and help get the word out about your event, helping find participants, sponsorships and donations.
- Committee members can help recruit volunteers.
- A committee can lighten the load. Successfully holding an event is a labor-intensive effort. You're going to need help. You can divide responsibilities among your committee members.

Establish a committee meeting schedule and location. Your committee should meet once a month. About three months before the event, it is recommended that you meet more frequently, about every two weeks. The last three weeks before the event, weekly meetings can be helpful.

**TIP:** To help your committee stay on track, consider taking and keeping minutes. A written record can help remind everyone of what has already been agreed upon.

## COMMITTEE ASSIGNMENTS

Depending on the size of your committee, you might want to divide responsibilities. Here are some suggestions for ways to divide responsibilities:

- **Chair:** This person can be responsible for making arrangements with the venue, caterer and production company. He or she will oversee the committee, help plan the menu, negotiate for reduced costs, coordinate permits, printing needs, and order awards or prizes.
- **Auction, Raffle or Games:** This person will track the solicitation of items for the auction, raffle or games, ensure that they are packaged well for presentation, and help to promote the function, coordinate the volunteers and check-out process. **If hosting a raffle, make sure to review and file any city, county or state permit requirements.**

## Gather a Team & Create a Plan CONTINUED

- **Registration:** This person will assist in the creation of a registration form or invite. He or she will track registrations in a database and will send confirmation messages to attendees as they register. This volunteer will coordinate with the venue for any work that needs to be done in relation to the attendee. This may include food restrictions, seating arrangements or if hosting a tournament team pairings, scorecards, rule sheets.
- **Sponsorship Coordination:** This person will help to coordinate solicitation of sponsorships, will ensure that all sponsors are given the appropriate promised recognitions, will coordinate the process of invoicing sponsors, and, if necessary, will coordinate the process of collecting sponsor logos. The sponsorship coordinator will also ensure that all sponsors are written thank you notes after the event.
- **Volunteer Coordination:** This person will coordinate the process of volunteer recruitment, volunteer assignments, and communication with volunteers. If volunteer t-shirts will be ordered, this person will coordinate the ordering and distribution of volunteer t-shirts. On event day, this person will staff a volunteer check-in station and will help direct volunteers to their assigned location and answer any volunteer questions.
- **Marketing/PR Coordinator:** This person will be the point person for promoting the event and will regularly update the event registration, invite and/or website. This person will send out regular email or phone messages to potential and registered attendees. This person will also ensure that there is media communication through press releases and calls to ensure coverage.

If volunteers are plentiful, the coordinators of each of these committees might want to recruit people to help them with their responsibilities.

Create a contact list which includes cell phone numbers before the start of committee meetings. Note that cell phones do not work everywhere and there may not be good coverage throughout the event area. Consider using walkie-talkies for key volunteers and the volunteer coordinator, particularly if cell phone coverage is spotty.

While it is helpful to give one person responsibility for coordinating these responsibilities, it is important that everyone continue to help and to use their personal contacts in the business community to solicit sponsorships, recruit attendees and volunteers, and to spread the word. No one person can solicit all the sponsorships or recruit all the attendees.



# Important Things to Consider

## CHOOSE YOUR EVENT DATE

Be sure to consider other local events in your community before selecting the date. If you plan to have an outdoor event, discuss with the venue what rain options you have. Selecting an alternative rain date now may help you down the road.

## SELECTING A VENUE

Where you hold your event will be important to its success. It's recommended that you visit and receive quotes from several locations before choosing your venue. Ask if the venue will assist in publicizing the event. As you choose your venue, remember that communicating with their staff person is going to be critical to your success.

## POLICY ON REFUNDS AND CANCELLATIONS

Decide in advance what your event policy on refunds and cancellations will be. Publish that policy on the registration form/invite and on your event website.

## PHOTOGRAPHY

Consider hiring a professional photographer or identifying a volunteer whose hobby is photography to take pictures of the event. Many times, attendees like to have their picture taken to remember the event. Pictures from this year's event are also helpful to promote next year's event. Publish a policy on the registration form/invite and on your event website that photos taken at the event may be used for future marketing purposes.

## SAFETY

Know the location of first-aid kits and AED devices, and ways to contact emergency rescue.

# How to Raise Funds

## SPONSORSHIPS

There are several types of sponsorships you can create. Suggestions include:

- **Presenting/Title Sponsor:** You can create either a Title Sponsorship, Presenting Sponsor or both. A title sponsor is usually the largest monetary sponsor. With Title Sponsors the name of the business is inserted into the title of the event and the event is always referenced by that title which includes the company name.

A Presenting Sponsor is also a top-biller, but the name of the company does not become the event name. Instead the event name remains and is also referred to as the Event presented by Company.

## How to Raise Funds CONTINUED

- **General Sponsorships:** Consider offering a few different levels of sponsorships (silver, gold, and platinum, for examples). Each level should be progressively more expensive and include more benefits than the lower level. Most sponsorships include at least one admission to the event.
- **Specific Area Sponsorships:** What unique areas within your event could you sell as a sponsorship package? Examples may include a tasting, games, beverage bar/cart, expo, auction, videos, dinner or lunch.

### REGISTRATIONS

The registration fee should cover the logistic costs of each person. An example would be adding the cost of the venue, food, swag, a donation to your cause and then dividing that by the attendee total. Be realistic on your attendance count, you don't want to under budget.

**TIP:** Agree with your committee that attendees will not be “comped” or admitted free, that fees will not be waived in exchange for services or donations unless the donation fits with the established sponsorship schedule.

**In addition to the primary ways you'll raise money, there are several things you can do to add opportunities for raising money for your cause. These include:**

### RAFFLE AND CHARITABLE GAMBLING

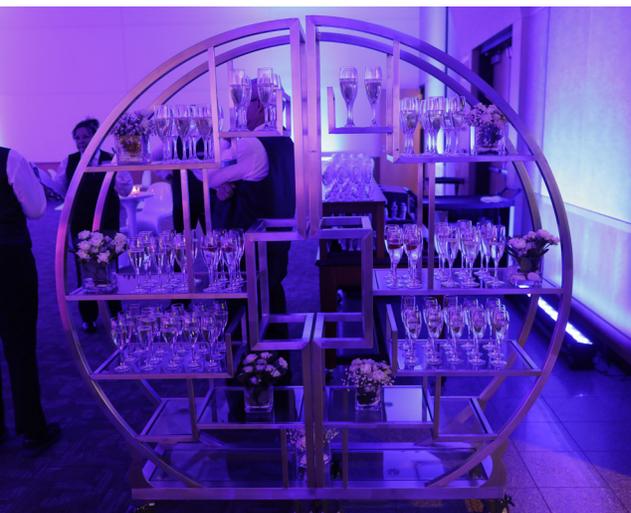
Raffling off a particularly desirable prize, trip, basket or holding a 50-50 raffle is a popular way to get attendees to part with their cash for a good cause. Interactive games like wall of wine, gift card wall, heads-and-tails are always easy ways to raise funds. If you are considering a support raffle or charitable gambling as part of your event, please visit the Minnesota Gambling Control Board website at [gcb.state.mn.us](http://gcb.state.mn.us) and obtain a raffle license. Both of these activities require your adherence to state regulations.

### AUCTIONS

Silent and/or live auctions are often added to events, usually in conjunction with lunch or dinner celebrations as an extra way to earn money for your cause. Regions Hospital Foundation will not be responsible for any claim or issue related to third-party event auctions and will not take possession of or be responsible for any items donated to your auction at the event.

### FUND-A-NEED

Many events add a lunch or dinner celebration at which the cause is explained more to the guests. During this time, you could ask attendees to participate in a direct contribution request.



# Promoting Your Event

## REQUIRED PROMOTIONAL GUIDELINES FOR REGIONS HOSPITAL FOUNDATION THIRD-PARTY EVENTS

The Regions Hospital brand is important to all of us. We take great pride in our brand and the image Regions Hospital portrays in the community. Our brand reflects a positive image and we work hard to ensure the messaging is consistent across all channels of our health care organization. The brand reflects the important work our researchers, physicians and staff do every day to provide exceptional patient care to the community we serve.

Therefore, we must be aware of and approve any use of our brand on all third-party materials.

**As the third-party event host or organizer, you must adhere to Regions Hospital's brand policies.**

After your event is approved, Regions Hospital Foundation will send the third-party event host or organizer detailed promotional guidelines outlining acceptable ways to advertise and market your event.

### THESE GUIDELINES INCLUDE THE FOLLOWING KEY POINTS:

- Regions Hospital Foundation reserves the right to approve all third-party promotional materials and make changes in messaging to ensure that the language is consistent with our branding guidelines
- Regions Hospital Foundation's name and the names of its affiliates are registered trademarks and cannot be reproduced without written permission from Regions Hospital Foundation
- Event promotional materials must state that proceeds will benefit a specific program at Regions Hospital (a Regions Hospital Foundation staff member can discuss with you the area of greatest need if necessary)



# Financial Guidelines

## FINANCIAL AND TAX REGULATIONS

Your event is subject to financial and tax regulations that require detailed accounting of your event revenues and expenses. While you are solely responsible for making sure you comply with these laws, we have prepared the following information to allow you to properly report your event's financial activity and to understand Regions Hospital Foundation's role and responsibilities as they relate to your event. You should consult a competent tax or legal professional for advice and guidance specific to your organization and your event.

We advise the third-party event host or organizer to create a well thought-out budget and follow the IRS 70/30 guidance on limiting expenses to 30 percent of total revenues raised.

## EVENT EXPENSE LIABILITY

The event host or organizer is responsible for all event expenses. Third-party event expenses will not be processed by Regions Hospital Foundation. If your event expenses exceed event revenues, neither Regions Hospital Foundation nor Regions Hospital will pay these expenses.

## INDEMNIFICATION

The third-party host or organizer must agree to indemnify and hold harmless HealthPartners, Regions Hospital, as well as Regions Hospital Foundation and its affiliates, from all claims and liabilities that may arise in connection with the event.

## EVENT BANKING

You may not set up a temporary bank account in Regions Hospital or Regions Hospital Foundation's name. There may be legal and tax implications for anyone who uses his or her personal bank account to process event revenues and expenses. Contact your legal advisor, tax advisor or bank representative to advise you in this area.

## NO FEDERAL AND STATE TAX EXEMPTION

Because Regions Hospital Foundation is not hosting this event, you will not be able to claim Regions Hospital Foundation's IRS 501(c)(3) charitable classification, federal tax ID number or state of Minnesota sales tax exempt certificate.



## Financial Guidelines CONTINUED

### GIFT RECEIPTING

Regions Hospital Foundation will not issue gift receipts for donors or participants who make a payment to your event. This includes participants who donate auction items and those who sponsor your event. If you wish to issue gift receipts to your donors or participants, you can apply for an IRS charitable classification. The necessary information can be found in IRS Publications 526 & 1771, which can be found at [irs.gov/charities](https://irs.gov/charities).

**TIP:** We strongly recommend you review the information found on the Minnesota Attorney General's Office website for their guidance on hosting a charitable event.

To learn more, visit [ag.state.mn.us/charities](https://ag.state.mn.us/charities).

## IMPORTANT

Note: If you are not using event revenue to pay event expenses, you may elect to have your donors and event participants make their checks payable directly to Regions Hospital Foundation and send them to us for processing.

In this case, Regions Hospital Foundation will provide receipts for each check to the check issuers acknowledging their charitable gift to RHF.

### SUBMITTING NET PROCEEDS

To make a contribution to Regions Hospital Foundation from your event proceeds, please make the check payable to:



Regions Hospital Foundation  
Mail Stop: 11202C  
640 Jackson Street  
Saint Paul, MN 55101

Include a copy of your approved third-party event proposal when sending your check to Regions Hospital Foundation. We will send a receipt to the check issuer.

# Key Event Expenses

**TIP:** Consider appointing one person, often the chair, who has the sole authority to authorize expenses. Make all volunteers submit their contracts and invoices to this person for contract signature and payment distribution.

Events are often expensive to produce. A few key expenses will include:

## VENUE AND PRODUCTION

More than likely, your largest expense will be the venue and production fees. Production fees are things like décor, linens, audio visual, race course supplies and such. Be sure to ask for a written quote, to negotiate, and to ensure that you know what is and is not included in the fee. Compare prices across venues in your area.

## FOOD AND BEVERAGE

Depending on the time of the day the event begins, you will likely need to serve food or beverage. Consider offering a food or beverage sponsorships. The sponsor could offer a meal or free drinks (1 drink ticket/guest, for example) in order to hold down your costs. Make sure to consult with your caterer on their policy before offering this idea because many do not allow outside food or beverage into the facility. Alcohol can be a significant expense. Always work to negotiate your prices.

## ENTERTAINMENT AND SPEAKER

Depending on the type of event you are hosting, research entertainment and speakers early. Be sure to ask for a written quote, to negotiate, and to ensure that you know what is and is not included in the fee. Many times you will have to pay for transportation and lodging if you choose an out-of-town guest. Also, make sure to review their rider before signing a contract.

## SIGNAGE

An event will need several signs including directional, registration/check-in, sponsors, games, etc. Signs and banners can be expensive to print. The printing of these items is often negotiable. If signs are un-dated or un-branded to specific look and feel for that year, they can be reused so consider using durable materials.

## SWAG & PRIZES

Many attendees, especially VIP guests, expect a gift. Consider a logo item so there is continued marketing for your cause after the event. If you don't care about branding, talk to your sponsors. Many of them will gladly donate items for the gift bags to feature their products or to promote their names. If you are hosting a tournament or awards ceremony, prizes can often be solicited from donors.

## INSURANCE:

Consider looking into insurance needs for your event. Insurance includes liability for the event and your committee, rain insurance, games insurance like "hole-in-one insurance" to name a few.

# Day-of-Event Volunteer Assignments

Running an event requires a lot of help. Here are a few examples of volunteer assignments you will likely need to cover the day of the event.

Volunteer  
coordinator

Swag/prize/award  
distributor

Event set-up

Recorder of scores,  
winners, etc.

Auction set-up

Games or  
specific areas

Greeters

Auction  
checkout

Registration

Clean-up/  
take-down

First-aid

Host/Group/Company Planning this Event: \_\_\_\_\_

Nonprofit organization/501(c)3  Department within Regions Hospital  Other

Event host or organizer's name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Primary phone: \_\_\_\_\_ Alternative: \_\_\_\_\_

Preferred method of communication:  Email  Phone

Affiliation to Regions Hospital: \_\_\_\_\_

Program you would like to support with your gift (specific fund name, if applicable): \_\_\_\_\_

Name of proposed event: \_\_\_\_\_

Event location and address: \_\_\_\_\_

Event date: \_\_\_\_\_ Event time: \_\_\_\_\_

Describe event and how funds will be raised (tickets, auction, etc.): \_\_\_\_\_

Event Type:  Public  Invite-only cost to participants: \$ \_\_\_\_\_

**Describe proposed event details, purpose and target audience:** \_\_\_\_\_

**Proposed Event Promotion and Publicity:** \_\_\_\_\_

Press releases  Flyers  Radio/TV/Billboards  Magazine  Newspaper  Social media  Other

Are there other beneficiaries besides Regions Hospital Foundation (RHF):  YES  NO If yes, who? \_\_\_\_\_

Will the event host or organizer gain monetarily from the event?  YES  NO

Do these persons have connections to a business that will benefit from the event?  YES  NO If yes, please explain: \_\_\_\_\_

Please estimate: Total event income: \$ \_\_\_\_\_ Total event expenses: \$ \_\_\_\_\_

Estimated gift to RHF: \$ \_\_\_\_\_ (Please submit checks within 45 days after your event)

My gift will be matched by my company/organization:  YES  NO

I, \_\_\_\_\_, agree that I understand the third-party event guidelines supplied by Regions Hospital Foundation and my responsibilities as a third-party event host pertaining to compliance of federal and state laws concerning fundraising events. I promise to abide and adhere to all statements made in the stated guidelines and attest the information provided on this form is correct and accurately describe the proposed event.

Event host or organizer's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Regions Hospital Foundation approval: \_\_\_\_\_ Date: \_\_\_\_\_

**IMPORANT: Please complete this form four months before your proposed event.** Only completed forms will be taken under consideration. Until a confirmation letter is received, contributions should not be solicited and the name Regions Hospital Foundation (RHF) should not be used for any purpose. RHF may withdraw approval at any time should we deem inappropriate messaging or behavior that exists with the third-party event. If approval is withdrawn, it will be done in writing to the event host or organizer. After approval is withdrawn, all references to Regions Hospital Foundation, Regions Hospital or related departments and programs must be terminated.