

Carle Community Fundraising Guidelines

CARLE HEALTH CENTER FOR PHILANTHROPY



About Carle Health Center for Philanthropy

The mission of Carle Health Center for Philanthropy is to inspire charitable gifts to enhance the world-class healthcare Carle provides.

Thank you for your interest in hosting a fundraising event for Carle.

We're truly grateful for those who support Carle through Community Fundraising Events. Our Community Fundraising Champions are those in the community who host independent fundraisers in support of Carle. All events, large or small, play a significant role in raising awareness and much-needed support for Carle's mission to provide high-quality care, medical research, and education.

Whether you're a fundraising novice or a seasoned expert, thorough planning and logistics are vital to the success of your event. The information in this guide will help you organize and host an effective event to benefit Carle.

SUBMIT YOUR COMMUNITY FUNDRAISING APPLICATION.

- All Community Fundraising Champions must complete the Carle Health Center for Philanthropy Fundraising Application in advance of the event and before using the Carle name and logo.
 - * *The application can be found on the last page of this guide.*
- Your application will be reviewed within 10 business days by the Community Fundraising team to ensure the event follows the Carle Health Center for Philanthropy guidelines and is consistent with our mission and values.
- Once approved, Carle Health Center for Philanthropy will send an approval email that can be used to assist in solicitation efforts.
- Each application will be considered individually.

Generally, events that won't be authorized are events that:

- Don't support the mission and values of Carle.
- Promote a political party/candidate or appear to endorse political issue(s).
- Potentially conflict with a marketing or public relations campaign.
- Require Carle staff to sell tickets or coupons or involve telemarketing or door-to-door solicitations.

Should Carle Health Center for Philanthropy decline the application or choose not to be affiliated with the third party event in question, any reference to Carle Health or its affiliates or subsidiaries in any form, including use of names or logos, is prohibited.

Let the Planning Begin.

People like you make a difference in the lives of Carle patients. Here's a timeline to help you start planning.

1. LET OUR TEAM KNOW.

- Fill out a Community Fundraising Application to receive support from our team.
 - After your application is approved, you'll receive an approval email.
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2. FORM A PLANNING COMMITTEE.

- Bring together a group of people who are enthusiastic about Carle and have the time to make the event a success.
 - Understand your team's strengths and delegate roles accordingly.
 - Host meetings throughout the planning process to ensure planning stays on track.
 - Remember, you're responsible for staffing the event as well as recruiting and managing volunteers.
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3. DETERMINE A BENEFICIARY.

- As a not-for-profit organization, Carle Health relies on charitable gifts to enhance the healthcare experience for those we serve.
 - With many locations and services throughout the region, we know that where and how you give back is important. That's why we offer opportunities to support your local hospital and community.
 - For your event, please select a beneficiary that your planning committee is passionate about.
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4. CREATE A BUDGET.

- Develop a detailed budget of expenses and income.
- Try to keep expenses low so your team can maximize your donation to Carle Health Center for Philanthropy.
- Identify items on your budget that could be donated by local businesses.
- Use your planning committee's network of friends when asking for donations from local businesses.

You're responsible for all expenses related to the fundraiser. Please deduct event costs from the funds you raise prior to sending the donation to Carle Health Center for Philanthropy.

5. OBTAIN INSURANCE, LICENSES AND PERMITS.

- Please obtain any necessary insurance, licenses and permits for your event.
 - As the event organizer, you're solely responsible for getting any necessary permits and clearances that may be required by the local or state government. You're also responsible for following all applicable laws and getting all appropriate insurance coverage (if necessary). Carle Health Center for Philanthropy cannot be held liable for details associated directly or indirectly with the event, including but not limited to expenses, purchases, insurance or liability coverage.
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6. SPREAD THE WORD AND INVITE GUESTS.

- It's time to let the community know about your event.
- To make the most of your marketing budget, consider who's most likely to attend your event and determine the best way to reach them.
- Create mailing lists for invitations.
- Be sure to advertise and market the event.

Due to patient and donor privacy policies, Carle Health Center for Philanthropy cannot provide mailing lists for donors, patients, staff and/or employees for fundraising purposes and is unable to mail information on behalf of the event.

- When designing your creative materials, please reference Carle as the beneficiary of your event.
- If you choose to name your event, Carle shouldn't be used in the title but rather listed as a beneficiary. For example, a run could be named "Friends Fighting Cancer Fun Run benefitting Carle."
- Please note that creative materials may not suggest that the event is sponsored, co-sponsored or produced by Carle.

Carle Health Center for Philanthropy reserves the right to review and approve all marketing materials in advance.

7. COLLECT DONATIONS AND HOST THE EVENT.

- Depending on the type of fundraiser you're hosting, there will be different ways to raise money for Carle.
- For example, you might collect pledges, charge admission or sell goods/services.
- Don't forget to have fun and enjoy seeing your hard work pay off.

If your event is interested in accepting credit card payments, you're responsible for obtaining the resources needed to process credit card transactions. Carle Health Center for Philanthropy cannot provide on-site credit card processing, webpages or giving links for your event.

8. CONGRATULATIONS!

- Acknowledge yourself and your planning committee for organizing a successful fundraising event.
 - Send thank-you letters and emails to participants and sponsors to let them know the impact they've made by supporting your event.
 - This effort may lead to donor support year after year.
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9. MAIL DONATIONS.

- Our preference would be to receive one check, made payable to Carle Health Center for Philanthropy, from your organization for all cash and checks collected through your fundraising activity.
- On the memo line of the check, please indicate that the funds were raised from your event.
- The check should be mailed or hand delivered to your local Carle Health Center for Philanthropy office. Locations and addresses are listed on the last page of these guidelines.
- A single check representing all gifts would not be eligible for a tax receipt.
- If you receive checks that are made to Carle Health Center for Philanthropy, you can include those with your single check (referenced above). Please let us know if there was an exchange of products or services (e.g., auctions, raffles, t-shirt sales, etc.) so we can provide an accurate tax receipt for the gift.

Due to donor privacy policies, Carle Health Center for Philanthropy cannot provide donation information of individuals who have or have not made an outright donation to your event. We will provide you with a summary of the total outright donations, if received.

10. THANK YOUR PARTICIPANTS AND SHARE YOUR SUCCESS.

- Share your event success story with our Community Fundraising team.
 - Our team would love to let you know how the funds your event raised made a difference.
 - And don't forget to schedule the date for next year's event.
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Frequently Asked Questions

How do I know if my event has been approved by Carle Health Center for Philanthropy?

The Community Fundraising team will respond to your submission within 10 business days to either approve your event or request more information.

Can I provide a business the Employer Identification Number (EIN) or W-9 of Carle Health Center for Philanthropy for verification?

If a business makes a donation to the event and would like our EIN/W-9 for tax purposes or to verify the tax status of Carle Health Center for Philanthropy, we'll provide the information to the business upon request.

Can I use Carle Health Center for Philanthropy's tax-exemption number?

Since Carle Health Center for Philanthropy isn't hosting your event, it's considered a third-party event. We're not authorized to provide our tax-exempt status to anyone outside of our organization.

Can someone from Carle Health Center for Philanthropy help me plan my event?

Because of the large number of events and limited number of staff, we aren't able to plan your event. However, we're happy to provide guidance and best practices to get you started, and we'll answer questions throughout your planning process.

If a donor wants a tax receipt, what should I do?

Our preference would be to receive one check, made payable to Carle Health Center for Philanthropy, from your organization for all cash and checks collected through your fundraising activity. On the memo line of the check, please indicate that the funds were raised from your event. The check should be mailed or hand delivered to your local Carle Health Center for Philanthropy office. Locations and addresses are listed on the last page of these guidelines. A single check representing all gifts would not be eligible for a tax receipt.

If you receive checks that are made to Carle Health Center for Philanthropy, you can include those with your single check (referenced above). Please let us know if there was an exchange of products or services (e.g., auctions, raffles, t-shirt sales, etc.) so we can provide an accurate tax receipt for the gift.

Can a Carle representative speak at the event?

Yes, you can request to have a Carle representative speak at your event. Due to the large number of requests, we cannot guarantee that a Carle staff member will be able to attend/participate. Please include the information on your event application.

Can you guarantee the attendance of physicians or staff at our event?

Due to the large number of requests, we can't guarantee that a Carle staff person (including medical staff) will be able to attend/participate.

Can I request support from a business as a representative of Carle?

No, you're a representative of a community event fundraiser benefiting Carle Health Center for Philanthropy. Carle Health Center for Philanthropy is not sponsoring, co-sponsoring or producing the event.

Who can I call if I have questions?

Contact Carle Health Center for Philanthropy at (217) 383-3021 or email philanthropy@carle.com.

Carle Community Fundraising Application

EVENT ORGANIZER

Name	Contact name (if different than organizer)	
Address		
City	State	Zip
Cellphone	Email	

EVENT DETAILS

Name of event	Date/time of event	
Description of event (i.e., car wash, golf outing, picnic, walk-a-thon, etc.)	Location/address of event	
Carle program to benefit from funds raised	Event is: Open to the public Invitation only	Ticket price/entry fee (if applicable) \$
If available, would you like literature to distribute about the Carle program that will benefit from your event? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, how many copies would you prefer?		
If possible, would you like to have a Carle representative present at your event? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<i>*Please note, due to the large number of requests, we cannot guarantee that a Carle representative will be available to attend/participate.</i>		

EVENT PROMOTION

How will the event be publicized?
Do you plan to use the Carle name and/or logo in your promotional materials? <input type="checkbox"/> Yes <input type="checkbox"/> No

FUNDRAISING INFORMATION

Total projected revenue \$	Total projected expenses \$	Projected contribution amount \$
Please tell us how you're planning to raise funds (i.e., ticket price/entry fee, live/silent auction, raffle, T-shirt sales, etc.).		

I have read and agree to comply with the Carle Community Fundraising guidelines from Carle Health Center for Philanthropy.

Please return to:

Carle Health Center for Philanthropy
611 W. Park St., Urbana, IL 61801
(217) 383-3021 | philanthropy@carle.com

X

Event Organizer signature

Date

Carle Health Center for Philanthropy office locations:

East Central Illinois (Urbana-Champaign, Danville, Mattoon, Hoopston)

611 W. Park St., Urbana, IL 61801

(217) 383-3021

Central Illinois (Bloomington-Normal, Eureka)

1302 Franklin Ave., Suite 2000, Normal, IL 61761

(309) 268-5966

Southern Illinois (Olney)

800 E. Locust St., Olney, IL 62450

(618) 395-6057