

INSPIRE  
TRANSFORMATIONAL  
GIVING  
TO IMPROVE **HEALTH**,  
ELEVATE **HOPE**, AND  
ADVANCE **HEALING**  
**FOR ALL.**



## COMMUNITY FUNDRAISING Guidelines

THANK YOU FOR YOUR SUPPORT!



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**We** are delighted that you want to get involved and raise funds for Atrium Health! Thank you for your interest in making Atrium Health Foundation the beneficiary of your fundraising efforts and supporting the work of Atrium Health physicians, nurses, research scientists, and other talented healthcare providers. Their exceptional efforts benefit people throughout the Carolinas and beyond.

We are very grateful for the volunteers and organizations whose committed efforts raise support for Levine Cancer Institute, Levine Children's Hospital, Sanger Heart & Vascular Institute, Carolinas Rehabilitation, and an array of patient care programs and services of Atrium Health. Our mission is to improve health, elevate hope and advance healing – for all.

Atrium Health, formerly Carolinas HealthCare System, one of the nation's leading and most innovative healthcare organizations, provides a full spectrum of healthcare and wellness programs through the Southeast region. Its diverse network of care locations includes academic medical centers, hospitals, freestanding emergency departments physician practices, surgical and rehabilitation centers, as well as hospice and palliative care services. Atrium Health works to enhance the overall health and well-being of its communities through high quality patient care, education and research programs, and numerous collaborative partnership and initiatives.

This guide outlines our promotional, financial and gifts processing policies and covers what you must know to help organize your event tasks and timelines. To help ensure that volunteer events and cause marketing promotions are successful, make best use of limited staff resources, and are coordinated with our other activities, please carefully review our fundraising guidelines and submit a proposal at least 30 days in advance of the proposed community fundraiser or initiative for required approval by Atrium Health Foundation.

We are thankful for your dedication, time, and efforts to raise money to contribute to Atrium Health and to improve health, elevate hope and advance healing – for all!

***For more information, please contact:***

***Meghann Utzig***

***704-355-4048***

***208 East Boulevard, Charlotte, NC 28203***

***Meghann.Utzig@AtriumHealth.org***



## Event Responsibilities

### *What Atrium Health Foundation can do and cannot do for your event.*

#### **You can:**

- Be creative and choose a fundraising event that's fun to plan and organize! A fundraising event is any organized activity or social function that is held for the purpose of raising money for a charitable organization, in this case Atrium Health Foundation.
- Return the completed proposal form to Atrium Health Foundation at least 30 days in advance of your event. It will be promptly reviewed to ensure it complies with municipal, county, state and/or federal law and reflects the mission and values of Atrium Health and Atrium Health Foundation. Your organization or group will receive a follow-up phone call or approval email from Atrium Health Foundation.
- Provide volunteers for your event.
- Secure insurance coverage and solicit sponsorships for the event. Unfortunately, Atrium Health Foundation cannot provide funding or reimbursement for event expenses.
- Spread the word! Send a direct message to your Facebook friends, post on Twitter and e-mail family and friends. Tag us @giveatrium. Reach out to local businesses, neighbors, your church community and local media outlets to ask for their help in promoting.
- Present the funds to Atrium Health Foundation within 30 days of the event. (Call Meghann Utzig to arrange a time: 704-355-4048). You can direct the proceeds to a certain area or fund within Atrium Health Foundation. Please choose one of the funds or check other and tell us where you would like the funds directed.
- Improve health, elevate hope and advance healing – for all.



#### **We can:**

- Provide a list of fundraising ideas and community fundraising event resources to help you brainstorm and support the gift processing for your event! Unfortunately, Atrium Health Foundation is unable to produce, manage or staff approved community fundraising events and initiatives.
- Once your fundraising event is approved, we can provide approved logos and logo files from Atrium Health Foundation. Please do not copy the logo from other sources. All printed materials, websites and other publicity with our name and logo need to be submitted to Atrium Health Foundation prior to printing and distribution.
- Help promote the event on Atrium Health Foundation social media channels.
- Provide (on loan) a banner with beneficiary logo to display at your event.
- Provide tax receipts to donors who make tax-deductible gifts at [www.atriumhealthfoundation.org](http://www.atriumhealthfoundation.org) or through checks payable to Atrium Health Foundation.

## General Guidelines and Policies

- 1) Atrium Health Foundation must approve all community fundraising events and cause marketing campaigns and reserves the right to deny any request for a fundraising initiative that fails to comply with any municipal, county, state and/or federal law. Additionally, Atrium Health Foundation reserves the right to deny any event or initiative that does not appropriately reflect the mission and values of Atrium Health and Atrium Health Foundation.
- 2) Atrium Health Foundation is unable to produce, manage or staff approved community fundraising events and initiatives.
- 3) Atrium Health Foundation must be notified in advance if another charity organization(s) will also benefit from your initiative or participate in raising funds. In identifying the beneficiary of the event, the Atrium Health facility or program should be named as the beneficiary of the net proceeds. For example: (Event name) benefiting Atrium Health Levine Children's Hospital. Atrium Health Foundation reserves the right to approve any and all beneficiaries.
- 4) Atrium Health Foundation fundraising policy prohibits the use of telephone solicitations by a third party for contributions from the general public.
- 5) For confidentiality reasons, Atrium Health Foundation cannot release donor, patient, or volunteer lists to an individual, company, group or organization. Also, Atrium Health Foundation does not sell goods or services from outside organizations.
- 6) If alcohol is being served at your event, you are responsible for ensuring all necessary licenses and permits are obtained. Atrium Health Foundation will not secure liquor licenses for third-party events.
- 7) If an organization plans to solicit contributions, sponsorships or in-kind gifts from businesses, the list of potential business sponsors must be reviewed and approved by Atrium Health Foundation prior to their approaching such sponsors.





## Financial Policies

- Atrium Health Foundation will not assume any legal or financial liability associated with your event, nor will we indemnify you or any party involved in your event for any damage, expense, or other costs arising from or in any manner related to your event. Atrium Health Foundation and all related entities are not liable for any injuries sustained by event volunteers or participants related to your event and cannot assume any type of liability for your event.
- In accordance with IRS regulations, the individual or organization conducting the fundraiser is responsible for disclosing to donors the exact dollar amount or percentage of their gift which will benefit Atrium Health Foundation.
- If applicable, you will be responsible for obtaining your own liability insurance to cover the event. Atrium Health Foundation will not insure your event and require that you obtain all necessary insurance, including liability and worker's compensation. You agree to indemnify and hold Atrium Health Foundation and its employees, agents and representatives harmless from and against any and all claims, demands, liabilities, expenses, losses, damage, and attorneys' fees arising from or in connection with the event.
- You are responsible for obtaining all permits and licenses—especially those for raffles or games of chance. If you or your organization would like to conduct a raffle, individuals and/or organizations must obtain a raffle license from the North Carolina Department of Justice: <http://www.ncdoj.gov/About-DOJ/Legal-Services/Legal-Opinions/Opinions/Raffles-Drawings.aspx>.
- You agree that you will not use Atrium Health Foundation's tax exemption in any manner or as part of the promotion of your event, nor will you represent to the public that you enjoy any tax-exempt rights or privileges as a result of your role in the event (unless you have separate tax-exempt status), nor will you state that any portion of the purchase price for any goods or services at the event is tax deductible for charitable purposes.



## Promotional Policy

- Publicity may not suggest that the event/initiative is being sponsored, co-sponsored or produced by Atrium Health, and must clearly state that Atrium Health Foundation is the beneficiary.
- All publicity involving the Atrium Health name must be approved by Atrium Health Foundation prior to production, distribution and/or release. We request lead time of two working days to review and approve references to Atrium Health Foundation in general printed materials, and lead time of five working days to review and approve proposed references to Atrium Health Foundation in press releases.
- Press releases, public service announcements, advertisements, printed materials (posters, brochures, invitations, etc.) are the responsibility of the individual/organization coordinating the initiative.
- Atrium Health Foundation may promote third-party fundraising initiatives through social media channels or other means on a limited basis.
- The use of any Atrium Health or Atrium Health Foundation logo or name may be used only after Atrium Health Foundation has granted approval. The Atrium Health Foundation will provide a camera-ready logo for printed materials and publicity. Please do not copy the logo from other sources.
- Atrium Health Foundation, in partnership with Atrium Health, may allow limited use of the logo by third-party fundraisers. Requests must allow at least two weeks in advance for consideration.





## Event Staffing and Support

- Atrium Health Foundation is unable to provide on-site staff and volunteer support (e.g. gifts processing, event organizing, recruitment of event sponsor/participants).
- Atrium Health Foundation staff may help by providing:
  - Information for distribution regarding research and patient care programs specific to the area your fundraiser is benefiting.
  - Give-away items with logo when available.
  - Recognition of funds raised in Atrium Health Foundation internal and external publications as deemed appropriate by our staff.
  - Hospital or lab tour for event participants or committee organizers and a chance to meet with Atrium Health physicians, nurses, or research scientists prior to or after the event, based on scheduling availability.
  - Atrium Health Foundation representative to participate in a check presentation at the event, based on availability. Requests must be made 4 weeks in advance.
  - Atrium Health Foundation representative to set up a booth/table at the event to answer basic questions. Requests must be made 12 weeks in advance and fulfillment of request is subject to event size, focus and anticipated proceeds of at least \$25,000.



## Gifts Processing Policy

- Please present funds from the event or community fundraiser within 30 days from its conclusion to Atrium Health Foundation by arranging a meeting with us at 704-355-4048. Thank you!
- If the third party is a 501(c)3 organization, all checks shall be made payable to, mailed to, processed by and receipted by the third party.
- If the third party is not a 501(c)3 organization and needs event revenue to pay for event expenses, all checks shall be made payable to, mailed to, and deposited into an event bank account by the third party. (We recommend stating on all event materials that gifts to the event are not tax-deductible.)
- Atrium Health Foundation can only provide receipts for a donation directly made payable to **Atrium Health Foundation**. Only individual checks payable to Atrium Health Foundation and cash donations (equal to or greater than \$5.00) clearly labeled with the donor's information will be provided with a tax receipt in accordance with IRS and state tax regulations. IRS guidelines prevent us from providing tax receipts for non-gift transactions such as ticket sales, purchases, raffle tickets, etc.
- In-kind donations to third-party community events and initiatives are not tax deductible.
- Please send donations to: Atrium Health Foundation, 208 East Boulevard, Charlotte, NC 28203.



## Levels of Support

Levels indicate assistance the Atrium Health Foundation may provide based on the expected proceeds from your community fundraising initiative.

Event benefit	\$1 –\$999	\$1,000 – \$4,999	\$5,000 – \$9,999	\$10,000 – \$49,000	\$50,000 +
Placement on Event Calendar	●	●	●	●	●
Information for distribution regarding research and care programs specific to the area your fundraiser is benefiting	●	●	●	●	●
Use of our web-based online fundraising tool	●	●	●	●	●
Use of Atrium Health Foundation name as beneficiary organization, outlined in guidelines and subject to approval	●	●	●	●	●
Publication of event information and recognition of funds raised in Atrium Health internal and external publications deemed appropriate by our team		●	●	●	●
Cards provided for thanking event donors <i>Thank you for supporting Atrium Health through <u>(event)</u>.</i>			●	●	●
An Atrium Health Foundation representative to participate in a check presentation at the event. Requests must be made 60 days in advance				●	●
A facility tour for event participants or committee organizers and a chance to meet with a faculty leader prior to or after the event					●
Speaker to attend event					●



Please return form to:  
Atrium Health Foundation  
208 East Boulevard, Charlotte, NC 28203  
704-355-4048  
Meghann.Utzig@AtriumHealth.org

For Atrium Health Foundation use only

Date approved:\_\_\_\_\_ Approved by:\_\_\_\_\_

## Community Fundraising Proposal

Contact Name:\_\_\_\_\_ Organization:\_\_\_\_\_

Briefly describe your organization:\_\_\_\_\_ Does your organization have 501c3 status? ☐ Yes ☐ No

Mailing Address:\_\_\_\_\_ City:\_\_\_\_\_ State:\_\_\_\_\_ Zip:\_\_\_\_\_

Contact Phone:\_\_\_\_\_ Contact Email:\_\_\_\_\_

Name of Proposed Event:\_\_\_\_\_ Start Date:\_\_\_\_\_ End Date:\_\_\_\_\_

Time:\_\_\_\_\_ Location:\_\_\_\_\_ Description of Proposed Event:\_\_\_\_\_

\_\_\_\_\_ Is this a first-time event? ☐ Yes ☐ No

Will event require insurance? ☐ Yes ☐ No (If yes, please attach proof of insurance) Are permits required? ☐ Yes ☐ No (If yes, please explain)\_\_\_\_\_

\_\_\_\_\_ Please state what percentage of event proceeds will be donated to Atrium Health Foundation:\_\_\_\_\_%

Projected Revenue:\_\_\_\_\_ Project Expenses:\_\_\_\_\_ Anticipated Net Revenue:\_\_\_\_\_

*Ideally expenses should represent 25% or less of the gross income for a fundraiser.*

List other beneficiaries besides Atrium Health Foundation:\_\_\_\_\_

Please choose one of the funds or check "Other" and tell us where you would like the funds directed. ☐ Levine Children's Hospital Advancement Fund

☐ Levine Cancer Institute Advancement Fund ☐ Sanger Heart & Vascular Institute Fund ☐ Other\_\_\_\_\_

Please list any already committed sponsors or sponsors that you plan to approach for support (Atrium Health Foundation partners with many businesses, so we may ask you to not approach certain companies for support):\_\_\_\_\_

Do you wish to utilize an Atrium Health Foundation logo or other Atrium Health facility logo? ☐ Yes ☐ No (If yes, please explain how and where you wish to utilize the logo and promote the event (print, radio, TV, social media, other)?\_\_\_\_\_

I acknowledge and agree to all the terms and conditions contained in "Atrium Health Foundation Community Fundraising Guidelines and Policies" attached and made a part of this application. I understand that my event is not considered an approved event until written approval of my application is received from Atrium Health Foundation. No amendment, modification, or waiver of any of the terms and conditions contained in this document shall be valid unless in writing. I agree that all marketing, promotion and publicity for the event must be approved by Atrium Health Foundation prior to being released, printed, mailed, etc. I agree that Atrium Health Foundation will receive all fundraising dollars from the event within 30 days of the event.

Signature of Applicant:\_\_\_\_\_ Print Name:\_\_\_\_\_ Date:\_\_\_\_\_



