



Atrium Health
Foundation

THIRD PARTY FUNDRAISING GUIDELINES

Who We Are:

Atrium Health Foundation is the philanthropic arm for Atrium Health service lines, patient programs, and facilities located across the Greater Charlotte region. Our mission is to inspire transformational giving to improve health, elevate hope, and advance healing – for all.



Our Fundraising Guidelines:

A fundraising event is any organized activity or social function that is held for the purpose of raising money for Atrium Health Foundation. Be creative and choose a fundraising event that's fun to plan and organize! In addition to hosting a **third-party event**, you may create a **personal fundraising page** on our secure fundraising platform to collect funds year-round in support of Atrium Health. With either approach, it is important that fundraisers align with the mission and image of Atrium Health and Atrium Health Foundation. **Thank you for representing us so well using the guidelines that follow.**

Here are a few things to consider before you get started:

Return a completed proposal form (found online at AtriumHealthFoundation.org/fundraising) to Atrium Health Foundation at least 30 days prior to 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 the Atrium Health Foundation.

Once your fundraising event is approved, we can provide approved logos and logo files for your event. **Atrium Health Foundation must review all printed materials, websites and other publicity that use the Atrium Health Foundation, Atrium Health, or any Atrium Health service line (ex. Levine Children's, Levine Cancer Institute, Carolinas Rehabilitation) name or logo prior to publishing and distribution.**

All proceeds need to be made payable to Atrium Health Foundation and mailed to us within 30 days of completing your fundraiser. Checks should be made out to Atrium Health Foundation and the fund noted on the memo line. Please mail your donation to: Atrium Health Foundation, Attn: Meghann Kirkley, 208 East Blvd, Charlotte, NC 28203

Third-Party Event Promotion:



- 1 Atrium Health or any Atrium Health service line may only be identified as your event's beneficiary. For example, your fundraiser can't be called Levine Children's Hospital Ride for the Kids; it should be called Ride for the Kids benefiting Levine Children's Hospital.
- 2 All publicity involving the Atrium Health name must be approved by Atrium Health Foundation prior to production, distribution and/or release.
- 3 If Atrium Health is one of several beneficiaries, the percentage or amount of proceeds that benefit the hospital must be clearly stated on all materials. Atrium Health Foundation reserves the right to approve any and all beneficiaries.
- 4 To avoid duplicate solicitations, we ask that you notify us before asking a business or company for a donation, cash or in-kind items.
- 5 We love sharing fundraisers' good news! Contact Meghann Kirkley to discuss the Atrium Health Foundation's sharing your event photos and success on social media. Please note: we do have guidelines and posts are created and shared at the discretion of our communications team.

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Event Planning Guidance:

- 1** In light of the evolving COVID-19 pandemic, we are advising all fundraising coordinators to continue to safeguard the health and well-being of those connected to your third-party fundraiser by abiding by local and state health guidelines. This includes but is not limited to efforts associated with social distancing, mask-wearing, hand hygiene as well as other measures deemed appropriate to help stop the spread of the virus.
- 2** You are responsible for covering event expenses and will not be reimbursed by Atrium Health Foundation. If there are expenses related to your event, please deduct these from the funds raised prior to sending your donation check. **Note: Personal Fundraising Pages may not be used to collect payment for any items that are not entirely tax deductible (such as t-shirt sales, raffle ticket sales, auction items bidding, and event tickets that are not 100% tax deductible). Personal Fundraising Pages are for 100% tax deductible donations only.**
- 3** No bank accounts in the name of "Atrium Health", "Atrium Health Foundation", or any Atrium Health service lines can be set up to hold funds from a community fundraiser. **You are responsible for managing all event funds and expenses.**
- 4** You are solely responsible for securing any required permits and a certificate of insurance for the event. 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.
- 5** 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.

We are unable to do the following: Atrium Health Foundation is unable to produce, manage or staff approved community fundraising events and initiatives; extend our tax exemption to you and your fundraiser; provide a mailing list of donors, patients, sponsors or volunteers; provide patient stories or pictures; host community fundraisers at an Atrium Health facility.

To start fundraising on behalf of Atrium Health:

- 1** Go to:
AtriumHealthFoundation.org
- 2** Click:
Get Involved > Start Fundraising
- 3** Complete an **EVENT PROPOSAL FORM** online and contact Meghann Kirkley with any questions:

Meghann.Kirkley@atriumhealth.org
(704) 519-7702

Atrium Health Foundation will support your event by:

- (1) Providing a logo to be used on marketing materials according to our guidelines.
 - (2) Promoting the event on Foundation social media channels.
 - (3) At our discretion, we may provide give-away items, banners and/or information for distribution regarding research and patient care programs specific to the event's area of focus.
 - (4) Provide a letter of endorsement on Atrium Health Foundation letterhead signed by our Development Officer of Community and Third-Party Fundraising to authenticate your fundraiser.
 - (5) In accordance with IRS regulations, Atrium Health Foundation can only provide a tax receipt for donations made directly to Atrium Health Foundation. This includes checks made payable to Atrium Health Foundation, cash gifts of \$50 or greater (which must also include all donor information), or online donations made via the Foundation's secure website AtriumHealthFoundation.org or our connected fundraising platform.
- IRS guidelines prevent us from providing tax receipts for non-tax-deductible transactions such as ticket sales, t-shirt sales, etc. You may **not** offer donation receipts directly to your donors utilizing Atrium Health Foundation's tax number or charitable status.