



COMMUNITY PARTNER FUNDRAISING

Toolkit and Resource Guide



WISCONSIN
MEDICINE

THE
FUTURE
NEEDS
US **NOW**



Thank you for your interest in supporting our campaign for Wisconsin Medicine. Whether you are interested in raising funds to support groundbreaking research or to help fund important patient care initiatives, we are grateful for your help in creating the future of health.

This toolkit is designed to help make your fundraiser the best it can be — from event ideas to promotional tips to building your online fundraising page.

**HAVE QUESTIONS
OR NEED ADVICE?**

Contact our team at
uwhevents@uwhealth.org

HOW WE CAN HELP YOU

We value you as a community partner – a company, organization, or individual raising money for Wisconsin Medicine.

We are here to support you along the way with the following:

- Answer questions and share our fundraising best practices.
- Offer event guidance, including how to find sponsors and volunteers.
- Help you get acquainted with our online fundraising tools.
- Offer an online platform for you to solicit donations safely and securely.
- Provide our logo and appropriate brochures and fliers, if available.
- Provide a representative from Wisconsin Medicine to speak to your guests, participate in a check presentation or host an event booth, when available.*

We are unable to offer support in the following ways:

- Sign contracts
- Provide sales tax exemption status
- Provide registration and/or silent auction tools or logistics
- Promote your event on social media
- Release mailing lists, donor or volunteer lists
- Be liable for any expenses incurred by a community partner involved in fundraising
- Provide insurance coverage
- Provide celebrities or professional athletes
- Solicit or provide auction items or prizes
- Provide volunteers

FUNDRAISING GUIDELINES

Fundraising events benefitting Wisconsin Medicine should align with our mission, vision, and values.

Please note the following guidelines:

- Please complete a Community Partner Fundraising Form at least six weeks prior to the proposed fundraising activity date. Please allow one week to hear from our team.*

If you started planning your event and it's less than six weeks away, we encourage you to submit the fundraising form regardless of timeline.
- Use of our name or logo on promotional materials should be reviewed by staff in advance of event promotion.
- Promotional materials should not suggest the event is sponsored, co-sponsored, or produced by a Wisconsin Medicine entity such as UW Carbone or American Family Children's Hospital. You may state that we are a beneficiary, such as "Bike-a-thon, benefiting UW Carbone Cancer Center".
- In accordance with IRS regulations, your event is responsible for disclosing the percentage of proceeds or dollar amount of your gift that will benefit a Wisconsin Medicine entity.*
- Wisconsin Medicine is not liable for any injuries sustained by event hosts, volunteers or participants and cannot assume any type for liability of your event.



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** Requires additional form. Please see page 9 for list of forms to complete and where to find them.*



FUNDRAISING IDEAS

Be creative! Every dollar makes a difference.

Consider the following or create your own idea:

- Sporting event or tournament
- Dance marathon
- Run/walk or bike
- Golf outing
- Cook-off
- Fashion show
- School fundraiser
- Concert or artist performance

- Donations in honor of a birthday, wedding or other special day
- Company-wide or department-wide dress-down day
- Round-up/point-of-sale campaign or cause marketing
- Use our tools to fundraise online

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TURNING AN IDEA INTO A FUNDRAISER

You have chosen your fundraising idea and now it is time to make it a reality.

Here are a few quick tips to get you started:

- Choose something with low overhead and flexible expenses. Controlling your expenses helps you focus on maximizing your bottom line.
- Get hard-cost items (food, beverages, auction items, etc.) donated when you can. Do not be afraid to ask companies that might be willing to donate. Offer to include their name and logo on event fliers, on your website or on event signage.
- Seek discounted rates on items when you can, such as space use, audio-visual equipment or décor. Some companies are willing to use this as an in-kind donation opportunity. Remember to offer to include their name and logo on flyers, websites and signage.

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CREATING YOUR FUNDRAISING TIMELINE

1 Contact us

Contact our events team at uwhevents@uwhealth.org to understand how we can help and to complete our Community Partner Fundraising Form.*

2 Set goals

Decide the scope of your project and how much money you want to raise.

3 Form a planning committee

Find people who are equally passionate about the cause.

4 Choose the right activity, date and location

Research your date to avoid major conflicts (home football games or other large fundraisers). When choosing a location, consider accessibility, parking, rental fees, etc.

5 Start planning

Give yourself a minimum of six months in advance to begin.

6 Create a financial plan

Try to keep expenses low by determining what needs to be purchased and identifying what can be donated. Consider expenses and income and how to manage your cash flow.*

7 Apply for and obtain necessary permits

This could be a permit for use of city streets, a city park permit or application with Wisconsin DNR for use of public trails.

8 Get your community involved

Connect with your community to donate prizes or silent auction items.

9 Create an online fundraising page using our tools.

Visit wiscmedicine.org/fundraise to learn how to easily start your own fundraising campaign.

10 Spread the word

Engage your audience through advertising, social media, media, e-mail, invites and more.

11 Collect donations and host event

12 Show your gratitude!

Send thank you letters and emails to volunteers, planning committee members, sponsors and attendees to show appreciation.

13 Share your success

Get in touch with our staff to send us photos or to set up a check presentation or lab tour. Let us help you celebrate your success and don't forget to set a date for next year!



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TIPS ON PROMOTING YOUR EVENT

Creating a timeline will help you promote your event while staying organized.

Six months prior to event:

- Choose an activity.
- Set a date.
- Book a venue or event space and finalize necessary permits.

Six-Eight weeks prior to event:

- Complete and submit Community Partner Fundraising Form*.
- Create a spreadsheet of names, emails and phone number of invitees (family, friends, co-workers, etc.), volunteers, media contacts and anyone else you want to reach out to during the process.
- If our logo is included, contact event staff for review.
- Design and send invitations to invitees.
- Design and hang up fliers, posters or banners.
- Create a social media event page and begin posting event details and sharing on social media.

Four weeks prior to event:

- Submit your event to local online community calendars.
- Email a pre-event news release to local media; list yourself as a contact for questions.

Two weeks prior to event:

- Share reminders on your social media event page.
- Ask friends, family, co-workers or other contacts to share the event page.

Day before your event:

- Send media alert to local media and news organizations; provide your information as a contact for questions.

Following event:

- Distribute news release with your fundraising total to local media, photos of your event and any other important information. Provide your information as a contact for questions.

LEVERAGING SOCIAL MEDIA

While there are many social platforms, Facebook is currently the easiest platform to spread awareness about your cause.

Consider the following

- Facebook's event tools provide you with a step-by-step process for creating an event page to share with your network. Encourage participants to spread the word about your event. Invite as many Facebook friends as you can directly from the event page.
- After announcing your event (typically about two months prior to event date), share a post on Facebook at least once per week to remind people it is coming up. As the event nears, you can up your post frequency to increase the event buzz.
- Facebook offers easy and cost-effective advertising options; make sure you explore the ad options that fit within your budget, and use their customization tools to reach a specific group of users (e.g. age, location and interest).
- Remember to stay focused on the goal. Always remember to circle back to the main purpose of the post and supporting the cause.
- Post a photo album from the event, update your audience on how much you raised, and tell them to save the date for next year!

Tips for Posts:

- Add images or videos
- Encourage interaction by tagging friends in the comments
- Create giveaways for tickets, t-shirts, and more
- Don't forget to tag us in your social posts!

** Requires additional form. Please see page 9 for list of forms to complete and where to find them.*

POST-EVENT FUNDRAISING FINANCIALS

Ways to Organize Funds Raised

Our UW Health events staff can work with you on receiving and organizing funds for your event. Please email us at uwhevents@uwhealth.org for assistance.

Silent Auction Donations

Whether the funds raised from a silent auction are considered a tax-deductible donation or not is specific to each item in the auction:

- If the winning bid of a silent auction item is at or below the fair market value of the item, the winning bid is not considered a tax-deductible donation.

Example: At your auction, pair of tickets to a Badger football game are valued at \$100. The winning bid for the tickets is \$80. This is not a tax-deductible donation.
- If the winning bid of a silent auction item is above the market value of the item, the portion of the winning bid above market value is considered a tax-deductible donation.

Example: At your auction, a diamond necklace is valued at \$500. The winning bid for the necklace is \$600. \$100 of this bid is considered a tax-deductible donation.

When it comes to specialty merchandise for a silent auction, the goods and services portion of an item is its fair market value. For example, you bought an autographed basketball for \$20. The fair market value of the basketball is still \$20, even with the

autograph. If you bought a pair of tickets to a Packers game for \$250 per ticket, but the value printed on the ticket is \$50 per ticket, the market value of each ticket is \$50.

Please be sure to fill out the Financial Contributions form when submitting any silent auction donations.

Raffle Proceeds

Please note that raffles require a license issued from the State of Wisconsin. Please visit doa.wi.gov for more information. Funds raised from a raffle are not considered a tax-deductible donation. So, if you purchase a raffle ticket, it is not a tax-deductible donation.

Goods and Services

When attendees come to an event, the items that they receive in exchange for their financial support are referred to as goods and services (G&S).

For example: If a \$100 ticket to an event includes a t-shirt and a meal for each guest, we need to assign a fair market value to the cost of the t-shirt and the meal (note: we need the fair market value, not the amount you paid if you were able to use any non-profit discounts or coupons). If the shirt is \$10 and the meal is \$15, your goods and services for each \$100 ticket is \$25. The goods and services portion of the ticket is not tax-deductible. Please note: the amount of G&S assigned does not decrease the amount of money supporting research and patient care. The amount is simply for tax receipting purposes.



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FREQUENTLY ASKED QUESTIONS

Can I use your tax-exempt number?

In accordance with IRS regulations, we cannot allow community partners to use our tax-exempt number. For more information on creating your own 501(c)3, visit irs.gov.

Who can I contact if I have questions? Can someone from your team help me plan the event?

We can help guide you through the process in a number of ways and want to empower you to run the best fundraiser you can. Please email us at uwhevents@uwhealth.org and a member of our team will be in touch.

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

We can request a representative from Wisconsin Medicine attend your event when available. This could include a researcher; a doctor or member of the staff. You must complete the Speaker Request Form* for us to consider providing a speaker at your event.

Why do I need to submit a Community Partner Fundraising Form*?

We want to be able to provide you with the appropriate amount of support. We ask you to complete the form and submit to our office at least six weeks prior to your activity date.

My event is less than six weeks away. Should I still submit the Fundraising Form*?

Yes, please complete and submit the form regardless of how soon your event is taking place. Our office will be in touch ASAP after your form has been submitted.

Can we direct our donation to a specific fund, disease type, memorial or in-honor fund?

Yes, please indicate when you turn in your donation. Contact us with questions at uwhevents@uwhealth.org.

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FORMS

Please refer to the following documents for additional information. These fillable forms are attached in separate files to the email you received from our Outreach and Events team.

Community Partner Fundraising Form (Required)

- Please submit a minimum of six weeks prior to your event.
- If your event is sooner than six weeks away, please submit form ASAP.

Fundraising Financials (Required)

- Includes required forms to submit donation(s) after your event.

Speaker Request Form (Optional)

- Please submit a minimum of six weeks prior to the date for which you are requesting a speaker.

Online Fundraising Tools

- Visit wiscmedicine.org to start your online fundraising page and maximize your efforts.



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