

# Because

the BAPTIST HEALTH  
fundraising community



## Guidelines for Baptist Health Foundation Community Fundraising

Please take a moment to review the guidelines to follow as you consider a fundraising special event, benefit or promotion to support the Baptist Health Foundation.

The following fundraising activities are prohibited in conjunction with Community Fundraising to benefit the Baptist Health Foundation:

1. Programs that raise money on commission;
2. Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity; and
3. Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or Internet).

### Submit Your Application

We ask that our Community Fundraising partners submit an application a minimum of 60 days prior to the event date or project start date. Your application will be reviewed and must be approved by the Baptist Health Foundation. You will be notified within 14 days if your application is approved.

[Submit your application online.](#)

Please be advised that the use of Baptist Health Foundation's name and/or logo in any fashion without written authorization may result in Baptist Health Foundation withdrawing all support or endorsement of the event.

### Approved Events

Approved applications will receive a letter of agreement (LOA) to be signed by you and the Baptist Health Foundation. The LOA is required, outlines the details of the event, and includes language indemnifying Baptist Health Foundation against any liability and clearly describe the rights, duties and obligations of all parties involved.

While Baptist Health Foundation may be able to provide guidance to third parties, we are unable to provide administrative, legal, tax or logistical assistance for the event.

## **Publicity & Sponsors**

The Baptist Health Foundation name or logo (including Baptist MD Anderson Cancer Center and Wolfson Children's Hospital) may not be used in the actual title or event name, or in any way that may imply Baptist Health Foundation's responsibility or liability of the event.

For events sharing 100% of proceeds: "Proceeds benefiting Baptist Health Foundation" may be used in promotional materials, invitations or advertising copy, if approved in advance by representatives from Baptist Health Foundation.

For events sharing a portion of proceeds: "xx% of Proceeds benefiting Baptist Health Foundation" may be used in promotional materials, invitations, or advertising copy, if approved in advance by representatives from Baptist Health Foundation.

All proposed advertising, copy and promotion materials that contain the Baptist Health Foundation's name and/or logo must be submitted for approval to Baptist Health Foundation prior to production or going live via the internet. Please note that this requirement includes invitations, letters, press releases, public service announcements, posters, banners, brochures, flyers and specialty items (i.e., T-shirts, mugs, caps, etc.) Any products or other item(s) sold at or in connection with events must be noncontroversial in nature.

Event organizer shall provide the Baptist Health Foundation a list of targeted sponsors for the event before they are approached in order to minimize overlap with other Baptist Health Foundation events and/or fundraising campaigns that may be underway.

## **Endorsements**

All promotions of the event must avoid any statement or appearance of the Baptist Health Foundation endorsing any product, firm, organization, individual or service.

## **Legal Requirements**

Events must comply with all federal, state and local laws governing charitable fundraising, gift reporting and special events. Any individual or organization conducting a third party event will be responsible for obtaining necessary permits and insurance (General Liability Insurance, event liability coverage, etc.) If athletic or sporting event, the event organizer must require all participants to sign a waiver/release.

It is recommended that the event organizer obtain commercial general liability insurance against all claims for injury to a person including death, or damage to property or loss of property in connection with event with limits of \$1M per event/\$2M aggregate. Baptist Health, its affiliated entities, including Baptist Health Foundation, and their respective officers, directors, and employees shall be named as additional insured.

## **Expenses & Proceed Distribution**

No bank accounts will be set up in the name of the Baptist Health Foundation. Baptist Health Foundation requests that it receive at least 50 percent of the net revenues of any third-party fundraising event. Requests for exceptions to this policy may be submitted to Baptist Health Foundation. All funds must be distributed to Baptist Health Foundation within 60 days following the conclusion of the event. The Baptist Health Foundation will issue IRS compliant charitable tax receipts to the full extent of the law for gifts made payable to the Baptist Health Foundation or made online through the Baptist Health Foundation web site.

The event organizer must determine the fair market value of all items, services or privileges associated with the event in advance and, if applicable, inform donors that the tax-deductible portion of their payment is only for the amount that is over and above what was received in goods or services. Event organizers must provide Baptist Health Foundation with evidence of compliance with IRS requirements. Event organizers shall provide the Baptist Health Foundation a complete accounting of all funds collected and expenses related to the event. The Baptist Health Foundation reserves the right to inspect all event financial records.

## **Raffles and Chance Drawings**

Baptist Health Foundation cannot sponsor raffles/chance drawings conducted by external groups and/or organizations. Baptist Health Foundation requires that all raffles/chance drawings conducted be in compliance with Florida Statutes and IRS regulations.

## **Event Cancellation**

Please be advised that if the Baptist Health Foundation's name is associated with the event in any way, if the circumstances warrant, Baptist Health Foundation may at any time direct you to cancel the event. You hereby agree to cancel the event, if so directed, and further agree to release all Baptist Health, its affiliated entities, including Baptist Health Foundation, and their respective officers, directors, and employees from any and all liability from the event.

## Community Fundraising Responsibilities

**Baptist Health Foundation responsibilities** to assist you with your event, in accordance with policy:

- Attend events or check presentations, as schedule allows
- Provide and approve the use of the Baptist Health Foundation's name and/or logo as appropriate.
- Assist in directing contributions toward areas of special interest or areas of need within Baptist Health.
- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Provide an online fundraising page
- Provide a Fundraising Toolkit and additional resources as needed
- Include your event/program on Baptist Health Foundation's online events calendar
- Process gifts and provide acknowledgment tax receipt ONLY for gifts made via an online fundraising page and gifts made payable to Baptist Health Foundation

**Community Fundraiser responsibilities:**

- Planning any promotion of your fundraising effort
- If hosting an event, creating and maintaining invitation and attendee lists. Baptist Health is not able to provide mailing lists of donors, physicians or vendors. We have made a commitment to our donors and patients to keep their personal information private.
- Arranging all event logistics and volunteers
- Soliciting gifts, donations or sponsorships from your approved list
- Producing and distributing communication and marketing materials, collateral, advertisements, flyers and giveaways and coordinating media coverage
- Setting up your fundraising page on the Baptist Health Foundation web site
- Paying for all event-related expenses
- Process gifts, provide acknowledgment tax receipt, if legally permissible, and deliver thank you notes for donations collected by event organizer