



Community Fundraiser Toolkit

Credell Health Foundation
Inspire Giving



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Welcome

Thank you for your interest in helping Iredell Health System.

Your consideration for supporting our efforts is greatly appreciated. Our health system embraces the generosity of people like you who share in our commitment to ensure the continuation of the most advanced healthcare while maintaining the warmth and compassion of a community medical services provider.

Iredell Memorial Hospital opened in 1954 as a locally owned, nonprofit acute care hospital. Over the years, as our services expanded beyond our walls, we became Iredell Health System. Iredell Health System now includes Iredell Memorial Hospital, Iredell Mooresville, Iredell Home Health, Iredell Wound Care & Hyperbaric Center, Corporate Wellness, Occupational Medicine, the Iredell Physician Network and more.

Iredell Memorial Hospital remains the largest and only nonprofit hospital in Iredell County. The comprehensive healthcare facility has 247 beds, more than 1,700 employees, and 260 physicians representing various specialties. The Health System's newest campus, Iredell Mooresville, is home to the area's only 24-hour urgent care facility, as well as an ambulatory surgery center, imaging center, rehabilitation services, and physician practices. The mission of Iredell Health System is to inspire wellbeing.

Iredell Health Foundation is a separate 501(c)(3) overseeing all charitable giving to benefit Iredell Health System.

Our mission is to **Inspire Giving!**

Event Guidelines



If you are interested in hosting a fundraiser on behalf of Iredell Health Foundation, we request that you read and review this toolkit before completing the application form.

The application provides us with a clear understanding of your plans and allows us to add it to our calendar and support your efforts the best we can. We will also be able to verify the legitimacy of your fundraiser should we receive inquiries from the public. You can use the form included in the toolkit or go to IredellHealthFoundation.org for additional options

Iredell Health Foundation is accountable for fundraising activities using Iredell Health System’s name. This application form is not a guarantee of approval. It must be submitted to the Foundation for review and be approved before any public announcements are made. We must make certain that your fundraiser aligns with the mission of our health system, that the dates do not conflict with the health system’s calendar and that the same sponsors are not asked multiple times for support.

Until the application is approved, no announcements can be made.

The fundraiser may not be promoted in any way using the Iredell Health Foundation names and/or logos. You may state, however, that the fundraiser is being held to the benefit of Iredell Health System

Below is our community fundraiser logo that you are welcome to use if your application has been approved. However, we reserve the right to review and maintain approval rights of any printed or digital items that use this logo.



Overview

What is community fundraising?

Community fundraising is any type of fundraising event or program conducted by an individual, group or organization where Iredell Health Foundation is the beneficiary. Fundraising can be done in the form of a special event, a cause marketing program or as proceeds of sale.

Who can conduct a fundraiser on behalf of Iredell Health Foundation?

Individuals and organizations can fundraise independently in support of Iredell Health Foundation. They can be grateful patient families, civic organizations, churches, schools, and businesses. Anyone in the community can fundraise to support the areas of greatest need at Iredell Health System or for a specific program of your choice.

How will this toolkit help me?

The toolkit is intended to assist you as you plan to fundraise for Iredell Health Foundation. Included are frequently asked questions, some tips on how to get started and what to do during and after you have fundraised for us. Our goal is to provide you with the tools necessary to be a successful fundraiser for Iredell Health Foundation, which benefits Iredell Health System.

Where will my donation go?

All donations made to Iredell Health Foundation go to our area of the greatest need unless you designate a specific program or area of the health system.

How can Iredell Health Foundation help me with my fundraiser?

- Provide a letter of authorization to validate the authenticity of the fundraiser.
- Offer feedback on your fundraiser and/or event.
- Provide and approve use of the Iredell Health Foundation community fundraiser logo on materials related to your fundraiser.
- Help you select an area of Iredell Health System for your donation to support.
- Coordinate a check presentation after your fundraiser.

We are here to support you, but listed below are some services we are unable to provide:

- Our tax exemption number.
- Insurance or liability coverage.
- Permits and/or licenses.
- Mailing list of donors and/or vendors.
- Iredell Health System or Iredell Health Foundation letterhead.
- Funding or reimbursement of your expenses.
- Publicity (e.g., newspaper, radio, television).
- Guaranteed attendance of Iredell Health System or Iredell Health Foundation staff, physicians, or patients.

Frequently Asked Questions



Can I use Iredell Health System or Iredell Health Foundation name and logo?

You cannot use the Iredell Health Foundation or Iredell Health System logo. Once your fundraiser is approved, we will provide the community fundraiser logo (shown on page 2) for your marketing materials. We will provide it as shown, in blue, and in black. The logo cannot be used in any other color or color combinations.

Before you print or distribute the materials, or place anything on a website, we must review everything that uses the community fundraiser logo and/or mentions Iredell Health System. All community logos added to websites must be removed within 30 days after the conclusion of your fundraiser.

How long does it take to get my Fundraiser Proposal approved?

Proposals are approved within 10 business days of receipt.

Do I need to create a 501(c)(3) (nonprofit) organization to host a fundraiser for Iredell Health Foundation?

No. Anyone can host a fundraiser for Iredell Health Foundation with our approval. Staff can provide an authorization letter confirming the organizer's intent to raise funds for Iredell Health Foundation.

Can someone from Iredell Health Foundation help me plan my fundraiser, and attend and/or speak at my event?

We are happy to provide guidance, but we do not have the staff to handle the organizational and administrative tasks associated with community fundraisers. We try to attend events supporting Iredell Health Foundation, but we cannot guarantee attendance of staff, physicians, patients, or volunteers at your event.

Can Iredell Health Foundation help me get a permit and/or license for my fundraiser?

The organization and execution of the fundraiser is the responsibility of the organizer. The organizer must obtain any necessary permits or licenses.

Can Iredell Health Foundation provide insurance for my fundraiser?

Because Iredell Health Foundation is the beneficiary and does not have direct involvement with running the fundraiser, we cannot provide insurance certificates. The event organizer is responsible for obtaining insurance if necessary.

Can I use the Iredell Health Foundation tax exemption number?

Because Iredell Health Foundation is not the host, a community fundraiser for the Foundation is considered a third-party fundraiser. For this reason, you will not be able to use Iredell Health Foundation's IRS 501(c)(3) charitable classification, federal tax ID number, or tax-exempt certificate.



Will each of my donors get a receipt?

Iredell Health Foundation cannot issue charitable tax receipts for donors or sponsors who make payments directly to your community fundraiser. If your donor wants a receipt, please be sure the check is made payable to Iredell Health Foundation and leave the check in its original form before sending it to the Foundation.

Please note that there are complex regulations around the distribution of charitable tax receipts. This includes donations of money, in-kind items and services. Issuing an inappropriate receipt can put our charitable tax status in jeopardy, so please do not promise any kind of receipt. For more information about charitable tax receipts, please contact Iredell Health Foundation.

How do I open a bank account for my event?

We recommend you open a non-interest-bearing checking account, or benefit account, at a local bank. The account must be opened in the third party's name. It cannot be opened using Iredell Health Foundation or Iredell Health System financial information.

Can I pay myself back for expenses I've incurred?

Iredell Health Foundation cannot fund or financially support community fundraisers. Coordinators are responsible for covering all expenses and cannot be reimbursed by Iredell Health Foundation. For these reasons, as you start to collect money, you may want to keep some funds on hand to help pay your expenses.

Can we present the check at Iredell Health System or Iredell Health Foundation?

Yes, we can arrange for a check presentation to be held at Iredell Health System following your fundraiser. Please contact Iredell Health Foundation at 704-878-7667 or Foundation@iredellhealth.org to schedule a time.

Getting Started



You may know you want to fundraise for the health system, but you're unsure where to start. This list is designed to help you narrow your focus and be more successful!

Form a committee and brainstorm.

Bring together a group of enthusiastic people willing to be part of a planning committee and brainstorm ideas for your fundraiser.

Decide on your fundraiser.

Whether you choose to host an event or raise money through your business, make sure it is something you and the committee can handle.

Select a date.

Pick a date and time that is appropriate and convenient for those who will be attending your event. If you are fundraising over a period of time, choose a time of the year you think is best for your potential supporters. Be sure to check community events calendars for conflicting fundraisers.

Create a budget.

You may find this to be a difficult part of the planning process, but it is vital. First, try to identify all the expenses involved with your fundraiser (invitations, postage, rental space, signage, food and catering, promotional materials, website, advertising, permits, etc.). Also consider streams of revenue (ticket sales, items sold, etc.). You should also think about if you will be able to get some items or services donated (food, equipment, printing, etc.) to reduce your costs. This step may make or break your idea so be as thorough as possible. We encourage you to keep your expenses at 20 percent of your budget.

Apply for approval of your event.

Fill out the application now that you have a game plan and send it for approval. A team member will respond within 10 business days of receiving the application.

Tackle the logistics.

Whether you're hosting an event or fundraising in another way, start planning the details of what it will take to pull off your fundraiser.

Stick to a timeline.

A timeline is important in planning a publicity strategy for your fundraiser. Create goals and set target dates to meet those goals.

Review money management.

You may find that you will need to establish a bank account to accommodate incoming revenue and expenses.

Send in the donation.

Event proceeds designated for Iredell Health System should be sent to the Iredell Health Foundation within 30 days following the conclusion of your fundraiser.

Physical Address

770 Hartness Road
Statesville, NC 28677
(8:00 AM – 5:00 PM, M-F)

Mailing Address

P.O. Box 5635
Statesville, NC 28687

Say thank you.

Sending thank you letters, notes or e-mails to everyone who participated in your fundraiser is essential.

Send us photos.

E-mail the best 3-5 photos from your fundraiser to: Foundation@iredellhealth.org. We would love to share them on our website and in reports and presentations.

Iredell Health Foundation

Community Fundraiser Application

This application is also available at IredellHealthFoundation.org as an online form and as a downloadable PDF you can fill in, print, and mail to the Foundation.

Today's Date: _____

Sponsor Information

Organizer's Name: _____

Company/Organization Name (if applicable): _____

Address: _____

City: _____ State: _____

Business/Personal Phone: _____ Cellphone: _____

Email _____

Fundraiser Information

Name of fundraiser: _____

Type of fundraiser: _____

Date(s): _____ Time: _____

Description of fundraiser (please be specific):

Location: _____

Has this fundraiser taken place before? Yes No If yes, when and who was the beneficiary? _____

Does your fundraiser require permitting and/or a license? Yes No

**Please note: As with any fundraising event or proposed raffle, please adhere to federal, state, and local laws regarding gaming permits.*

Budget/Fundraising

Will Iredell Health Foundation be the sole beneficiary of this event? Yes No

(If no, please list other beneficiaries) _____

Approximate number of people expected to participate: _____

Anticipated gross revenue \$ _____

Anticipated expenses \$ _____

How will expenses be paid? _____

Anticipated net revenue \$ _____

Anticipated donation to Iredell Health Foundation \$ _____

Will the fundraiser be sponsored or underwritten by a company or organization business? Yes No

If yes, please specify all sponsors involved: _____

Briefly describe how funds will be raised (i.e., ticket sales, collections, sponsorship, auction, raffle, etc.) _____

Will your gift be designated to a specific health system program? Yes No

If yes, which one? _____

Insurance

Name of insurer* _____

Iredell Health Foundation may require the insuring of any special event/fundraiser. The health system assumes no liability related to special events conducted on its behalf.

Because the Foundation solicits a large number of local businesses, prior approval may be necessary before asking for donations. Please list all businesses, civic or social organizations, or foundations which will be or have been solicited for underwriting, sponsorship, in-kind giving, auction items or other contributions for this event. (Attach an extra sheet if necessary.) _____

Publicity & Promotions

For publicity purposes, a contact name and number that can be publicly listed:

Name: _____

Phone: _____

Email: _____

Website: _____

How will the event be publicized (social media, press releases, flyers, TV/radio, newspapers, website)? _____

Do you plan to use the IHF-provided community logo or name on event materials?

Yes No

We must approve any materials with IHF-provided logo or name

Your name entered below will be accepted as your signature.

Signature: _____ Date: _____

Please email, mail or fax completed application to:

Iredell Health Foundation
P.O. Box 5635
Statesville, NC 28687
FAX: 704-878-4568
Email: Foundation@iredellhealth.org



Iredell Health Foundation

770 Hartness Road
Statesville, NC 28677

704.878.7669

IredellHealthFoundation.org