

COMMUNITY FUNDRAISER GUIDELINES AND POLICIES

UCSF Benioff Children's Hospital Oakland needs and appreciates your support! Almost anything can be turned into a fun way to raise money and increase awareness of the special kind of care at UCSF Benioff Oakland.

Great fundraisers can be organized by anyone.

- Children giving a birthday party request that people make a donation instead of giving a present.
- Students raise money through their school activities, clubs, or sports teams.
- Individuals put on benefit concerts and fashion shows.
- Even bakeries have been known to donate proceeds from the sale of a special cupcake of the month.

TYPES OF FUNDRAISERS

Many different types of fundraisers can be held for UCSF Benioff Children's Hospital Oakland. Large or small, we appreciate them all.

- Walks/Runs
- Toy drives
- Book drives
- Mock Olympics
- Swim-athons
- Fashion shows
- Bake sales
- Auctions
- Scout/school projects
- Dance marathons
- Car washes
- Store/Restaurant tip drives
- Businesses donating a portion of proceeds
- Birthday parties, wedding parties (in lieu of presents to the honoree, donations are collected for the hospital)

HOW DO I START?

- 1) Organize the roadmap of your event. Refer to the special event "Ten Easy Steps" guidelines for information on how to organize your event.
- 2) Understand the information below in "Fundraising Event Policies" about financial records, tax receipts, logo use requirements and policies.
- 3) Complete an event application form and submit it. Your application will be reviewed and event details will be discussed with your organization before final approval is given.

TEN EASY STEPS TO ORGANIZING A SUCCESSFUL FUNDRAISING EVENT:

- 1) A successful fundraising event is always supported by an effective planning committee of enthusiastic and dedicated individuals with a diverse set of skills. We recommend having a committee with multiple members so assignments can be delegated with ease and individuals can fill in for each other.

- 2) Decide what type of fundraiser you want to have, and what you wish to accomplish (e.g. raise a specific amount of money, or teach friends about the organization). Then start thinking about themes, venues, food and beverages, prizes and programming. Your event should fit the size, interest, talents, goals and time availability of your group and complement the mission and image of UCSF Benioff Oakland.
- 3) Think about who is most likely to support the type of event you've chosen.
- 4) Once you know what type of event you'd like to organize, it is important to submit an Event Proposal Form. Once the form has been submitted, the formal approval process has begun. If all your paperwork is in order, you can expect to receive a response within 2-3 weeks.
- 5) It is important to begin by establishing your financial goals. Keep them realistic, especially the first year. Remember UCSF Benioff Oakland is grateful to receive any amount from a community fundraiser.
- 6) Schedule your event for a time, date and location that is appropriate for your target audience. Important Tip: Check the Foundation's online event calendar to avoid competing activities on your chosen date.
- 7) Identify possible sources of income and anticipated expenses. Make note which items you need to buy and which items can be donated. Important Tip: Keeping your up-front costs down by identifying sponsorship opportunities will ensure a larger contribution to UCSF Benioff Oakland.
- 8) Connect with your community by seeking in-kind goods and services from local vendors for your event. This could include donations of food, venue, entertainment, auction items, etc.
- 9) Develop a timeline to know when important tasks are due and who is responsible. This will help keep your event and your committee on schedule. Develop a timeline to know when important tasks are due and who is responsible. This will help keep your event and your committee.
- 10) Your plan for promoting and publicizing your event will be key in reaching your target audience and goals. Send invitations and emails to your friends and family and ask them to help by telling their circle of friends. Give yourself plenty of time for invitations and publicity.

And Most Importantly:

- Remember you are doing this for a good cause and that you, your committee and volunteers are supposed to be enjoying yourselves. Don't let any stress take all your enjoyment out of it.

- Congratulate yourself and your committee for planning a successful event. Acknowledge and thank your donors, participants, sponsors and in-kind donors.
- Organize a follow-up meeting with your committee to discuss and evaluate your event and start the planning for next year.

APPLICATION PROCESS

An application must be completed and submitted to UCSF Benioff Children’s Hospital Oakland no less than 45 days prior to the activity. Approval will be granted on a per event/promotion basis, and applicants must reapply annually for repeating events.

We reserve the right to deny any application for an activity that does not complement the mission of, or project a positive image of, UCSF Benioff Children’s Hospital Oakland or its related entities.

FUNDRAISING EVENT POLICIES

- 1) **Event Accounting:** Community fundraising organizers are required to submit accounting and attendee/ sponsorship lists after the completion of the fundraising activity. Please refer to “Accounting” below for more details.
- 2) **Benefit Statement:** Your application must state how UCSF Benioff Children’s Hospital Oakland will benefit from the event or promotion. If Children’s will not receive all proceeds, the exact percentage benefiting Children’s must be stated on the application and all related publicity.
- 3) **Approval to Use Brand:** Fundraising event organizers/sponsors/organizations may not use the name “UCSF Benioff Children’s Hospital Oakland,” or any form of the UCSF Benioff Children’s Hospital Oakland brand or logo, or any term implying endorsement or support of UCSF Benioff Children’s Hospital Oakland without receiving written authorization from the Foundation before any public outreach for the event is conducted. When requested, this approval will be sent by email.
- 4) **Branded Publications/Media:** All event-related publicity in which the UCSF Benioff Children’s Hospital Oakland name and/or the logo are used (print, broadcast or online) must be approved by the Foundation in writing before distribution to the public. When requested, this approval will be sent by email.

USE OF BRAND:

Our Name: The official name of our organization is “UCSF Benioff Children’s Hospital Oakland.” It may not be altered or abbreviated.

Event Name: Names of events may not incorporate the hospital's name, as in "UCSF Benioff Children's Hospital Oakland Swim-a-thon." The approved manner in which to use our name in publicity is to first list the event name, followed by "benefiting UCSF Benioff Children's Hospital Oakland."

Example: Strawberry Fields Dance-A-Thon, benefiting UCSF Benioff Children's Hospital Oakland

Publicity may not imply the event is sponsored or co-sponsored by UCSF Benioff Oakland or that the hospital is involved as anything but the beneficiary.

LOGO USAGE:

Our logo may not be modified in any way other than scale. You may run it as large or as small as you see fit, within reason and with approval of the Foundation. Please see brand guidelines for logo usage.

MODIFICATIONS NOTED BELOW ARE NOT PERMITTED:

- Changing colors (please request a black & white logo if you would prefer that over color)
- Changing the font
- Separating the name or moving it above the kid graphic
- Changing the text to run in one line
- Placing a box around the image
- Changing the size or perspective of just one part of the image (the kids or the text)
- Stretching or compressing the shape of the logo
- Changing the order of the kids
- Changing the direction of the logo (it should be used horizontally only)
- Any other alterations to the image as you are given it.

The only permissible alteration to the logo is to change the overall size of the image—make it larger or smaller (maintaining proportion) as you see fit, within reason and with approval of the Foundation.

BANNERS:

A limited number of banners with the UCSF Benioff Children's Hospital Oakland name are available for outside groups to borrow, with a few limitations:

- A credit card imprint for \$50 will be taken. This will be destroyed uncharged when the banner is returned in the same condition in which it left.
- Banners may not be picked up more than 48 hours before the event, and must be returned no later than 48 hours after the end of the event.

MEDIA:

If media (TV, radio, newspaper or bloggers) will be present at the community fundraiser, organizers must notify the Foundation in advance. The Foundation will then notify the hospital's Media Relations department.

No photos from UCSF Benioff Children's Hospital Oakland publications or website may be used to promote the community fundraiser prior to receiving specific written approval from the Foundation. When requested, this approval will be sent by email.

SPONSORSHIP:

All sponsorship solicitations are to be made by the event organizer. UCSF Benioff Children's Hospital Oakland does not solicit sponsors for community fundraising events. The Foundation also does not advance monies for outside fundraising activities.

important: You are required to provide UCSF Benioff Children's Hospital Oakland a list of prospective sponsors for the event, before they are contacted, to ensure that prospective sponsors are not currently being solicited for another pre-approved event.

ACTIVITIES THAT CANNOT BE APPROVED:

To protect UCSF Benioff Children's Hospital Oakland, there are some activities that will not be approved, including those that:

- Involve a professional fundraiser, telemarketer and/or involve an agreement to raise funds on a commission, bonus or percentage basis.
- Require UCSF Benioff Children's Hospital Oakland's endorsement of a product, service or participation in the direct sale of a product or service.
- Fail to comply with any municipal, county, state and/or federal laws governing charitable fundraising, gift reporting and special events.
- Involve promotion of a political party, candidate, or appear to endorse a political issue.
- Involve products sales on UCSF Benioff Children's Hospital Oakland's grounds, at any of our clinics, in our hospital building or our Outpatient Center.

FINANCES:

UCSF Benioff Children's Hospital Oakland is not financially or otherwise liable for the promotion and/or of the staging of fundraising events by any community fundraiser organization of individual.

LEGAL & INSURANCE:

UCSF Benioff Children's Hospital Oakland and the Foundation will provide event liability insurance for UCSF Benioff Children's Hospital Oakland and the Foundation for its own legal liability only. UCSF Benioff Children's Hospital Oakland and the Foundation coverage does not extend to any party or participant.

You, as event organizer:

- Can enter into contracts on your own behalf and that of your group, but not on behalf of UCSF Benioff Children's Hospital Oakland and the Foundation.
- Have sole responsibility for any of the subcontractors you hire to provide services for the event.
- Will indemnify UCSF Benioff Children's Hospital Oakland and the Foundation for any losses suffered as a result of your own performance pertaining to organizing the event.
- Will need to provide your own insurance.

WHAT WE CAN DO TO SUPPORT YOU:

- Offer advice and expertise on event planning
- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Provide permission to use the Children's name and logo upon approval
- provide limited supplies including banners, flyers, copies of publications and handouts
- Assist in designating your contribution to a specific area, such as research, equipment or a medical program (if there is interest in designating, please confirm with the Foundation before doing so)
- Provide IRS-compliant tax receipts to donors who make their checks payable to "UCSF Benioff Children's Hospital Oakland Foundation"

WHAT WE CANNOT DO:

- Be financially liable for any costs or expenses associated with community fundraisers.
 - Note:** The sponsoring organization/individual may not incur any financial or other obligations on behalf of UCSF Benioff Children's Hospital Oakland or the Foundation.*
- Open or manage bank accounts for community fundraisers.
- Advance any funds or pay expenses in anticipation of funds raised from a community fundraiser.
- Provide funding or reimbursement for expenses
- Assume responsibility for promoting your event
- Be responsible for selling tickets to your event
- Provide on-site staff or volunteers for fundraising events
- Share our mailing lists, including donors, physicians, employees, volunteers or vendors
- Provide insurance coverage to any party or participant
- Guarantee attendance of staff, physicians or patients at an event or check presentation raising under \$10,000
- Provide names/stories of Children's Hospital patients
- Endorse or be affiliated with any events that are for the benefit of one specific patient
- Provide space for the hosting of events, including private homes or on the grounds of the Hospital

POSTEVENT-FOLLOW-UP:

UCSF Benioff Children's Hospital Oakland must receive the following from the community fundraising organizer:

- 1) Accounting: A complete accounting of all funds collected and expenses related to the event. This includes:
 - a. A list of all event donors & participants, with a full breakdown of all funds collected.
 - b. Detailed lists of all monies raised through raffles, auctions, ticket sales, sponsorship or other methods of collection, including a precise accounting by donor's name.
 - Note:** Funds should be sent or delivered within 60 days of the event. Checks should be payable to UCSF Benioff Children's Hospital Oakland.*
- 2) Participant Information: Community fundraising organizers should collect names of participants, sponsors and volunteers and send a final list of all participants, sponsors and volunteers, including contact information to UCSF Benioff Children's Hospital Oakland within 60 days of the event.
- 3) Photos: Don't forget photos! We would love to get pictures of your group's activity, the happy participants and the festivities. Photos can be mailed on CD or emailed.

Please send or deliver all net proceeds, with the aforementioned lists and photos, to:

UCSF Benioff Children's Hospital Oakland
attn: Community Fundraisers
2201 Broadway, Suite 600
Oakland, CA 94612

Questions? Please contact us at events@mail.cho.org.