

IOWA

GUIDELINES

FOR HOSTING COMMUNITY FUNDRAISING EFFORTS

to benefit

UNIVERSITY OF IOWA STEAD FAMILY CHILDREN'S HOSPITAL

through

THE UNIVERSITY OF IOWA CENTER FOR ADVANCEMENT



University of Iowa
Stead Family
Children's Hospital



THANK YOU!

Thank you for your interest in hosting a community fundraising effort benefiting University of Iowa Stead Family Children's Hospital through the University of Iowa Center for Advancement. UI Stead Family Children's Hospital is able to offer top-quality care in a welcoming environment due, in part, to financial donations from people like you. Your support will help UI Stead Family Children's Hospital continue to provide excellent care and treatment for children, as well as offer amenities and support to their families.

The UI Center for Advancement is a nonprofit organization on the University of Iowa campus that solicits private, tax-deductible contributions for all areas of the university, including UI Stead Family Children's Hospital. The University of Iowa acknowledges the UI Center for Advancement as the preferred channel for private contributions that benefit all areas of the university.

Your community fundraising effort will help support the most urgent needs at UI Stead Family Children's Hospital, including improving the emotional well-being of our patients and families through enhancements in medical technology, research, and clinical care.

In this toolkit, you will find information about hosting and planning your effort, as well as the promotional and financial guidelines for UI Stead Family Children's Hospital and the UI Center for Advancement. Please read the information carefully.

A member of our UI Stead Family Children's Hospital Corporate and Community Development Team will contact you within one week of receiving the form to inform you if your effort is approved. Please contact **communityfundraising@foriowa.org** with any questions.

We hope you find this toolkit helpful for planning your community fundraiser.



PRIOR TO ANY EFFORT ACTIVITY:

Please contact our UI Stead Family Children’s Hospital Corporate and Community Development Team at least **two months** prior to the effort to obtain approval. Regardless of timeline, a proposal form must be completed for any effort. Our team will contact you within one week of receiving your submitted proposal.

The UI Center for Advancement reserves the right to request additional information before approving any effort or activity. Once approved, we can verify the viability of your effort to the community and donors. Only approved efforts will be given permission to use the “proceeds benefit” logo.

All effort proposal forms and general effort inquiries should be directed to:



UI Center for Advancement

ATTN: UI Stead Family Children’s Hospital Community Development Team
One West Park Road
Iowa City, IA 52242



communityfundraising@foriowa.org

HOW WE CAN HELP

To help your effort be as successful as possible, our corporate and community development team can provide a variety of assistance and services to guide you in your fundraising efforts, from which the resulting donations benefit UI Stead Family Children's Hospital through the UI Center for Advancement. Upon approval of your effort proposal, we will be able to provide:

- Advice and expertise on effort planning and accepting donations.
- "Proceeds benefit" logo usage and guidelines. The logo must be used in accordance with the UI Center for Advancement and UI Stead Family Children's Hospital branding standards. Logo usage must be approved. We reserve the right to ask for "proceeds benefit" logos to be removed if not used to branding standard.
- Permission and promotional requirements for use of UI Stead Family Children's Hospital and the UI Center for Advancement names and logos.
- Limited supplies, including fliers and information about the area of support.
- Tax receipts to donors who make checks payable to "UI Stead Family Children's Hospital" or "UI Center for Advancement" (When donation is unrelated to receiving something in return).
- Gift recognition for donations as appropriate.

COMMUNITY FUNDRAISING RESPONSIBILITY

Because of our limited staff and resources, and to not associate liability to either UI Stead Family Children's Hospital or the UI Center for Advancement, we are unable to provide support for all fundraising activities. We appreciate your gift of time and talent to help expand our fundraising efforts. Unfortunately, we cannot:

- Provide access to current or former patients of UI Stead Family Children's Hospital.
- Secure an appropriate venue or other services (e.g. food, entertainment, etc.).
- Guarantee on-site staff or volunteers at fundraising efforts.
- Share the UI Stead Family Children's Hospital or UI Center for Advancement's mailing lists, including donors, physicians, employees, volunteers, vendors, or patients.
- Promote and/or generate publicity on behalf of your effort, nor provide photos to be used as promotional materials.
- Guarantee social media exposure – these requests are approved on a case-by-case basis.
- Provide insurance coverage, permits, or licenses for your effort.
- Secure sponsorships for your effort.
- Provide funding for your effort.
- Guarantee attendance of staff, physicians, or patients at your effort(s), including subsequent check presentations or photo opportunities with staff or patients.
- Provide access inside UI Stead Family Children's Hospital or UI Hospitals & Clinics for you or any participants.
- Neither the UI Center for Advancement nor UI Stead Family Children's Hospital assume liability for the execution or planning of your effort.



PROMOTIONAL REQUIREMENTS

The University of Iowa Stead Family Children's Hospital and the University of Iowa Center for Advancement brands are important to all of us. We take pride in our brand images and work hard to ensure the messaging connected to them is positive and consistent, because they reflect on the important work of our physicians, researchers, faculty, and staff.

As a volunteer community fundraising effort host/organizer, you assume the responsibilities of adhering to the brand policies of UI Stead Family Children's Hospital and the UI Center for Advancement.

Please follow our promotional guidelines outlining accepted ways to advertise and market your effort.

These guidelines include the following key points:

- All promotional materials should state that proceeds will benefit University of Iowa Stead Family Children's Hospital and in no way suggest UI Stead Family Children's Hospital or the UI Center for Advancement are in any way responsible for the effort.
- UI Stead Family Children's Hospital and the UI Center for Advancement reserve the right to review all promotional materials and make changes in messaging to ensure that the language is consistent with branding guidelines.
- In order to use our logo for promotion, you are required to fill out the event proposal form and detail how it will be used. **The UI Center for Advancement will require you to agree to terms of usage once the effort is approved. Note: if logo usage is approved, it is approved for the effort being proposed only. Any future fundraising efforts will need to be resubmitted for approval.**

FINANCIAL GUIDELINES

We have prepared the following information to help you understand your role and that of the UI Center for Advancement as it relates to the financial and tax regulations associated with planning a fundraiser. It is important to know that detailed accounting of effort revenues and expenses is important for tax purposes.

DONOR INTENT

In order for the UI Center for Advancement to accept donations from your effort, the promotions and solicitations should clearly indicate the donors' intentions—the purpose for which the funds are being raised.

The use of the “proceeds benefit” logo indicates the purpose. In text, we recommend this statement: **“All proceeds from this effort benefit University of Iowa Stead Family Children’s Hospital through the University of Iowa Center for Advancement.”**

EFFORT EXPENSES

As the effort organizer, you are responsible for finding sources of funding for the effort, if necessary. Community fundraising expenses will not be processed by the UI Center for Advancement, including any and all bills associated with the effort, and any credit or debit card transactions for the effort.

The UI Center for Advancement expects that effort organizers will not keep any portion of the effort proceeds as profit or compensation for organizing the effort. If effort expenses are greater than the revenue generated, the UI Center for Advancement and UI Stead Family Children’s Hospital are in no way responsible for those costs.

EFFORT BANKING

The UI Center for Advancement cannot serve as a bank for your effort. There may be legal and tax implications for any individual who uses his or her personal bank account to process effort revenues and expenses. Contact your legal advisor, tax advisor, or bank representative to advise you in this area.

DISCLAIMER:

The UI Center for Advancement reserves the right to adjust the contents of this packet to meet the needs of individual effort circumstances. Those situations are evaluated internally and done so on a case-by-case basis.

It is expected that unless otherwise approved, all community fundraising effort activities will adhere to the guidelines outlined in this packet.

FINANCIAL GUIDELINES (continued)

EFFORT TAXES

The effort organizers are responsible for paying all applicable federal, state, and/or local taxes incurred during the planning and execution of the effort.

FEDERAL AND STATE TAX EXEMPTION

Because neither the UI Center for Advancement nor UI Stead Family Children's Hospital is hosting the effort, you will not be able to use the tax identification number assigned to these entities.

TAX TREATMENT OF DONATIONS

Your effort staff is responsible for collecting all gift funds generated. Only checks made directly to the UI Center for Advancement and/or UI Stead Family Children's Hospital may be classified as gifts to the UI Center for Advancement. In this case, the UI Center for Advancement will provide receipts for each to check issuers.

However, certain types of donations are not considered gifts to the UI Center for Advancement, including:

- Payments to the effort organizers for effort participation, such as "entrance fees" or "suggested donations" or "sponsorships"
- Payments made by individuals that are used to defray effort costs
- In-kind donations to your effort (certain businesses may be able to treat such donations as business expenses in accordance with their own obligations)

AUCTIONS, RAFFLES, ETC.

If your effort includes an auction, raffle, or similar gambling activity, please clearly state that intent in the "effort details" section of the proposal form. Careful consideration must be given to these activities, which may require state-specific licenses and other compliance steps.

SUBMITTING NET PROCEEDS

To make a contribution to UI Stead Family Children's Hospital from your effort proceeds, please make the check payable to:

**University of Iowa Center for Advancement
c/o Corporate and Community Development Team
One West Park Road
Iowa City, IA 52242**

Thank you for reviewing our guidelines. We look forward to helping you plan a successful community fundraiser.

DID YOU KNOW?

Many companies offer matching gift programs to support the charitable interests of their employees. Please email communityfundraising@foriowa.org if you have any questions about matching gift programs, donations, or forms.