



Office of Advancement

COMMUNITY FUNDRAISING TOOLKIT

Julie Bowditch, Community Fundraising
Office of Advancement
333 South Street
Shrewsbury, MA 01545
Phone: (508) 856-8554
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Office of Advancement

INTRODUCTION

The Office of Advancement welcomes your partnership to support quality research and health care at the University of Massachusetts Medical School (UMMS) and UMass Memorial Health Care (UMass Memorial). The ever deepening programs of UMMS and UMass Memorial are made possible by the interdependent partnerships between a generous community and the professionals who make our academic health sciences center a leader in patient care, medical education and groundbreaking research. We are committed to building lasting relationships and engaging new relationships with our community volunteers. Your efforts, support, and talent provide patients today and tomorrow with the benefits of the enormous spectrum of research, education and clinical advancements happening throughout UMMS/UMass Memorial's vast infrastructure. Together with your partnership, we are helping to transform community and world health.

Donations raised through your fundraising event play a critical role in enhancing community awareness and propelling innovative research and patient-centered care. Your support helps put medical advances into action to improve the health and quality of life for patients. We will work with you to make your event a success and help you to plan a fun, well organized event in support of The University of Massachusetts Medical School and/or UMass Memorial Health Care. We invite you to learn more by contacting our Julie Bowditch, advancement officer, community fundraising, or visiting <http://www.umassmed.edu/advancement>.

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ABOUT Us

The University of Massachusetts Medical School (UMMS) includes the School of Medicine, Graduate School of Nursing and Graduate School of Biomedical Sciences. Established in 1962, UMMS is recognized as one of the fastest-growing research institutions in the United States and is proud of the innovative education it provides for our future physicians, scientists, nurses, and health care leaders. UMass Medical School's research enterprise continues to advance the frontiers of medicine and build on past advancements that are at work saving and transforming lives around the world. Its scientists and physicians are motivated by the direct connection that exists between medical discovery, advanced health care and quality of life. By using basic research to examine cellular and molecular activity in the body, UMMS scientists take a whole-body approach to understanding the root causes of disease and reasons for disease progression. These findings are applied to clinical research and used to develop and evaluate new therapies and treatments.

UMass Memorial Health Care (UMass Memorial) is the region's trusted academic medical center, committed to improving the health of the people of Central New England through excellence in clinical care, service, teaching and research. UMass Memorial Medical Center includes three campuses located in Worcester, Massachusetts. The University, Memorial and Hahnemann Campuses offer a full complement of sophisticated technology and support services, providing the region with specialists renowned for their clinical expertise in heart and vascular, orthopedics, cancer, emergency medicine, surgery, women's health and children's medical care. As the hub of an integrated health care system, UMass Memorial Medical Center is affiliated with four community member hospitals: Clinton Hospital, HealthAlliance Hospital, Marlborough Hospital and Wing Memorial Hospital. In addition, the UMass Memorial network of care includes community-based physician practices, home health, hospice, rehabilitation and behavioral health services.

Together...

The UMMS and UMass Memorial form an academic health sciences center that is poised to become one of the nations' elite health care providers. Deeply committed to advancing patient care through innovative medical education and training and groundbreaking research, its work has already made significant contributions to the world.

Our Role...

The UMass Memorial Foundation, Inc. (UMMF) was established in 1998 as a 501(c)(3) nonprofit corporation and raises funds on behalf of the University of Massachusetts Medical School and UMass Memorial Health Care. The Office of Advancement carries out the work of the UMMF. Through the careful and responsible stewardship of these funds, the Office of Advancement works with donors to facilitate advancements in medical research, patient care, and the education of tomorrow's medical professionals.

For more information, visit <http://www.umassmed.edu/advancement>.

Office of Advancement

GETTING STARTED

Community Event Information

Thank you for organizing a fundraising event to benefit the UMass Medical School and/or UMass Memorial Health Care. The details of your event are important to us. Please provide us with information about your event by completing the enclosed Community Event Information Form. Mail, fax or deliver it to:

Julie Bowditch, Community Fundraising
Coordinator Office of Advancement
333 South Street, Shrewsbury, MA 01545
Phone: (508) 856-8554
Fax: (508) 856-5490

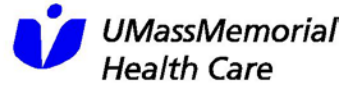
Office of Advancement Involvement

Our staff is here to answer your questions and work with you towards a successful event. The services we provide to you and your committee members are as follows:

- Provide guidance in creating your event
- Answer your questions and offer suggestions for your event (via telephone or planned meeting)
- Provide templates for solicitation letters, auction forms, thank you letters, press release
- Review and approve promotional materials (invitations, flyers, forms). Use of our name and/or logo must be approved by the Office of Advancement
- Promote your event through our Office of Advancement /UMMS/UMass Memorial calendars and publications when possible
- Assist in arranging speakers/guests from the University of Massachusetts Medical School and/or UMass Memorial Health Care to attend your event and/or check presentation
- Provide donor acknowledgments for gifts
- Direct donor gifts to designated department(s)

The Office of Advancement **DOES NOT** provide the following services:

- **Does not** provide committee meeting space
- **Does not** provide Office of Advancement staff to attend committee meetings
- **Does not** provide mailing lists of donors, staff or volunteers
- **Does not** guarantee specific speakers/guests from the University of Massachusetts Medical School and/or UMass Memorial Health Care
- **Does not** provide names of vendors to support event
- **Does not** provide funding for or reimbursement of event expenses
- **Does not** provide financial accounting for event (detail of tickets, raffle, auction, etc.)
- **Does not** provide receipts valuing in-kind donations
- **Does not** design, print and mail invitations



Office of Advancement

COMMUNITY EVENT INFORMATION FORM

Please complete and submit this form to the community outreach coordinator of the Office of Advancement. By signing this form, you agree to the terms and conditions listed at the bottom of this form.

Name of Individual/Group/Company Planning Event: _____

Contact Name: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: (Home) _____ (Business) _____ (Cell) _____

E-mail Address: _____

Event Name: _____

Date: _____ Time: _____

Location: _____

Frequency (specify): Annual Event One-Time Event Other: _____

How did you find out about us and develop an interest to organize this fundraising event?

This event is in honor or memory of an individual/individual(s): Yes No

For "in honor", provide name and address of individual(s) _____

For memorials (person's name _____), please provide contact information for relative(s).

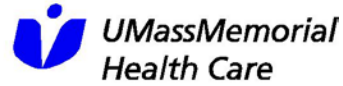
Brief description of event and how funds will be raised: _____

Fundraising goal: \$ _____

Proceeds from event will be directed to:

University of Massachusetts Medical School (specify department): _____

UMass Memorial Health Care (specify department): _____



Office of Advancement

COMMUNITY EVENT INFORMATION FORM

I would like an online donation page created for my event: Yes [] No []

See attached Online Donation page for more information.

Itemization of Non-Deductible Donations: (items which were not donated/purchased using funds donated by sponsor)

Admission price: \$ _____ Registration fee: \$ _____
Meal expense: \$ _____ Golf expense (golf, cart): \$ _____
Entertainment Expense: \$ _____ Other Expenses (shirts, gifts, etc.): \$ _____

Terms and Conditions:

My signature on this form acknowledges my understanding of the following terms and conditions.

- All communication and promotional materials will be submitted to the Office of Advancement for approval prior to their use.
University of Massachusetts Medical School and UMass Memorial Health Care may use my event logo(s) and materials to promote this event.
Office of Advancement will not provide funding or reimbursement of expenses for this event. Expenses for this event must come out of the proceeds from this event.
All donations received from this event will be forwarded to the Office of Advancement.

Name of Event Organizer (please print)

Date

Signature of Event Organizer

Please email or send completed form to:

Julie Bowditch, Community Fundraising
Julie.Bowditch@umassmed.edu

Office of Advancement
333 South Street
Shrewsbury, MA 01545

Fax: 508-856-5490

Office of Advancement Use Only:

Date form received: _____
Received by (please print): _____
Signature of Advancement staff member: _____

Approved [] Not Approved [] by _____

Office of Advancement

ONLINE FUNDRAISING

The Office of Advancement has partnered with FirstGiving to help you raise funds. We will work with you to create a personalized fundraising page. Online personal fundraising pages are passionate, powerful and persuasive, and you help you raise more money with less effort. Please visit <http://www.firstgiving.com/ummf> and click "View all fundraising pages" to look at some examples of community event fundraising pages.

For questions regarding the set up and design of your page, please contact Julie Bowditch, Community Fundraising at (508) 856-8554 or Julie.Bowditch@umassmed.edu.

UMASS MEMORIAL FOUNDATION



University of
Massachusetts
UMASS Medical School



UMassMemorial
Health Care

UMass Memorial Foundation

[Home](#) [About](#) [Supporters \(0\)](#)

The UMass Office of Advancement is fortunate to be affiliated with dedicated community members and the creative fundraising events that they passionately and successfully organize and execute. The charitable efforts of our volunteers provide vital funding for the University of Massachusetts Medical School and UMass Memorial Health Care, Inc. in support of pioneering research and treatment, medical education, state-of-the-art patient care and public service. The integrated work of our researchers and physicians is helping to quickly move new discoveries from the laboratory to the bedside, providing our patients with the most advanced treatments and comprehensive patient care. Donations raised through volunteer-based community events provide essential funding towards these advances in medical research and patient care.

A personal fundraising page is a powerful and persuasive tool which will raise more money with less effort. We proudly support our community volunteers and have made it easy to create a fundraising web page, share personal stories and collect donations.

Click the "Get Started" button now and see how easily you can begin raising money today!

Choose the event you wish to support > Set your fundraising goal > Share your passion and goals with all of your potential supporters!

Ideas to enhance your personal fundraising page

- Make your page more personal by including your photo. Your friends and family will be supporting you!
- Share your personal story and why raising funds through this event is important to you (edit the default text).
- Send your story and a link to your personal fundraising page to friends, family and colleagues!



Like 4 people like this. Be the first of your friends.

[Start Fundraising](#)

[Email](#) [Share](#) [Tweet](#) [Share](#)

The UMass Memorial Foundation Inc

About this nonprofit

The UMass Memorial Foundation Inc
333 South St Room 290
Shrewsbury, MA 01545
EIN: 04-3108190

Mission
The UMass Memorial Foundation, Inc. raises funds on behalf of the University of Massachusetts Medical School and UMass Memorial Health Care, Inc. Through the careful and responsible stewardship of these funds, the Foundation works with d...

Web
<http://www.umassmed.edu/development>

Resources
Contact Us
[UMass Medical/UMass Memorial Development Office](#)
[UMass Memorial Medical Center](#)

Donate directly to this nonprofit

[Donate](#)

Office of Advancement

ANSWERS TO FREQUENTLY ASKED QUESTIONS

What form of payment does the Office of Advancement accept?

Donations may be delivered to the Office of Advancement in the form of cash, checks or through your event's online donation fundraising page. Donations may be sent to our office in several deliveries/mailings as you organize your event or may be delivered after your event has taken place. Please do not mail cash.

To whom should donors make their checks payable?

If funds are to be split between these institutions, checks should be made payable to the UMass Memorial Foundation or UMMF. The name of your event should be noted in the "Memo" section of all checks.

How do I set up an online donation fundraising page for my event?

Online personal fundraising pages are passionate, powerful and persuasive, and you will raise more money with less effort. The Office of Advancement has partnered with FirstGiving to help you raise funds for your event. We will work with you to create a personalized fundraising page. Donors may also visit your personal fundraising page and make a donation, Please visit <http://www.firstgiving.com/ummf> and click "View all fundraising pages" to look at some examples of community event fundraising pages.

May I direct the funds that are raised from my event to the UMass Medical School and/or UMass Memorial Health Care?

Yes. You may indicate where you would like your funds to be directed by using the community event information form or by speaking with the community outreach coordinator. When donations are received by the Office of Advancement the funds will be deposited to the specified department or fund.

Does the Office of Advancement have a list of vendors that will donate services for my event?

Volunteers have greater success securing vendors that will donate services towards their event. Vendors with whom you or your volunteers have a relationship are more willing to donate services to your group in support of you and your event. The Office of Advancement does not have a list of vendors that have requested their name be shared with organizers of community fundraising events.

Do I need to give the Office of Advancement a list of companies that I plan to approach for support?

No. Our community outreach coordinator is happy to review your list of potential sponsors with you. We encourage you to approach companies with which you have a personal relationship. Companies are approached daily and usually respond to people and causes to which they are personally connected. Remember, they are supporting YOU because you asked. We will work with you to help you secure a gift from a potential donor interested in supporting you and your effort.

May I get an accounting of my donors' gifts after the event has closed?

Yes. Once all donations have been received by the Office of Advancement we can provide you with a total of the net proceeds raised by your event. Donations raised are deposited into the account of the department that you designate to be the recipient of your proceeds. The Office of Advancement does not have access to the account in which the donations are invested.

Does the Office of Advancement share or sell the donor information it gathers?

No. To respect donors' right to privacy, the Office of Advancement does not distribute or sell donor information to outside sources.

Will donors receive a gift receipt for tax purposes for gifts made to my community fundraising event?

The Office of Advancement will provide a gift receipt for all tax deductible gifts to each donor with a valid name and address.

Office of Advancement

Are all donations to my community fundraising event tax deductible to my donors?

We recommend each donor consults with a tax advisor to determine the tax consequence of a donation. In general only donations for which **no goods or services are received in exchange for the gift are 100% tax deductible**. The portion of a ticket equal to the value of the event's cost is not tax deductible to individuals purchasing tickets to the event. (i.e., Cost of dinner, entertainment, registration fee, etc. are not tax deductible. The amount above the cost of the event is tax deductible). Amounts paid for raffles or participation in contests for prizes are not tax deductible. Only amounts paid in excess of the retail value of an auction item are tax deductible.

When placing a value on items donated to my event, do I use retail or wholesale values?

All donated or purchased items are valued at retail value not wholesale value. This includes items donated to your event or purchased at wholesale prices. Items donated by vendors/individuals to cover costs of an event (i.e., food, beverages, hall rental, entertainment, advertising) must be itemized at fair market value when calculating the expenses for your event.

Do I need Special Event Liability Insurance Coverage for my event?

Special event insurance is liability protection for groups, organizations, individuals, committees, clubs, and companies that host community fundraising events which may pose a liability risk. This coverage may be required at or by the facility, auditorium, park, city or state authorities involved with your event. The Office of Advancement does not have liability coverage which protects organizers of community fundraising events. We advise you to ask the venue holding your event if they have liability insurance for special events which protects you and your committee throughout your event. Consult your local insurance company for guidance regarding your need for Special Event Liability Insurance.

For more answers to your questions, please contact our Julie Bowditch, Community Fundraising at (508) 856-8554 or Julie.Bowditch@umassmed.edu.

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EVENT PLANNING AND ORGANIZING CHECKLIST

6 to 12 Months Ahead

- Choose a theme
- Visit potential sites
- Receive cost estimates (site rental, food, drinks, sound/lights, rental, special equipment, etc.)
- Receive recommendations and estimates for entertainment
- Receive estimates for decorations
- Receive estimates for design/printing
- Receive estimates for other major items
- Draft initial budget
- Decide on entrance fee
- Create sponsorship amounts/levels
- List items to be underwritten and possible sources
- Decide/approach honorees
- Compile mailing list (members/potential members, industry professionals)
- Check proposed date for potential conflicts, finalize date in writing
- Receive written contracts for site, entertainment, auctioneer, emcee, etc.
- Develop alternative site (if event is outdoors)
- Invite/confirm special guests/directors
- Pick graphic artist; begin invitation design
- Provide hi-resolution logo to graphic artist
- Order save-the-date cards or other event announcements
- Set marketing/public relations schedule
- Develop press release and calendar listings
- Select photographer; arrange for photos of special guests, honorees, directors
- Investigate need for special permits, licenses, insurance, etc.
- Meet with all outside vendors, consultants to coordinate event

3 to 6 Months Ahead

- Begin monthly committee meetings
- Write/send requests for sponsorship/auction donations to potential business sponsors
- Request logos from corporate sponsors for printing
- Review invitations, programs, posters, etc. with graphic artist
- Prepare final copy for invitations, return card, posters
- Prepare copy for tickets/finalize
- Finalize mailing lists for invitations
- Order invitations, posters, tickets, etc.
- Sign contract with entertainment company
- Finalize potential sponsor mailing lists; follow-up with corporations and potential sponsors
- Set menu with caterer for food and beverages
- Secure permits and insurance
- Receive written confirmation of attendance from special guests/honorees
- Finalize audio/visual contract
- Select/order trophies/awards
- Assess and plan for security or valet, if needed

2 Months Ahead

- Assemble/address invitations (with personal notes when possible)
- Mail invitations
- Finalize transportation as needed
- Obtain contracts for decorations and rental items
- Follow up to confirm sponsorships/auction donations
- Obtain logos from corporate sponsors for program printing
- Review needs for signs at registration, directional, etc.
- All major chairpersons to finalize plans
- Hold walk-through of event with responsible volunteers at event site
- Review/finalize budget task sheets and tentative timeline
- Start phone/email follow-up for table sponsors
- Send press release and calendar listings to local newspapers and media

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1 Month Ahead

- Conduct phone/email follow-up of RSVPs
- Confirm volunteers for registration and hosting
- Write to special guests, honorees, program participants to confirm participation
- Receive enlarged site plan/room diagram; assign seats/tables (if needed)
- Give estimate of guests expected to caterer/food service
- Review script/timeline/agenda
- Continue phone/email follow-ups to secure attendees
- Confirm transportation scheduled: limos, parking (update attendee numbers)
- Confirm hotel accommodations (as needed)
- Schedule deliveries of special equipment, rentals
- Confirm setup and tear down times with event site
- Get event alcohol permission
- Design Auction

1 Week Before

- Touch base with all committees for last-minute details
- Finish phone/email follow-ups
- Confirm number attending
- Hold event run-through with volunteers; finalize assignments
- Secure two or three volunteers to assist with emergencies
- Select which volunteers will conduct registration
- Distribute seating chart assignments to volunteers
- Schedule pickup or delivery of any rented or loaned equipment
- Double-check arrival time and delivery times with vendors
- Reconfirm event site, hotel, and transportation
- Deliver final scripts/talking points/agenda/timelines to all program participants
- Finalize catering guarantee
- Confirm number of volunteer staff
- Make follow-up calls to news media for advance and event coverage
- Distribute additional fliers

- Final walk-through with all personnel
- Schedule volunteer assignments for day of event
- Prepare name badges and check against attendee list

Day Before Event

- Recheck all equipment and supplies to be brought to the event
- Have petty cash
- Finish seating/table arrangements
- Prepare additional name badges, have a supply on hand of blanks & pockets for walk-ins
- Print alpha attendee list

Event Day

- Arrive early at least two hours in advance to set up event
- Finalize registration set-up
- Unpack equipment, supplies and make sure nothing is missing
- Check sound/light equipment and staging before rehearsal
- Set up identifying signage or posters
- Final check on arrangements and facilities (bathrooms)
- Ensure all special guests/honorees are in place
- Set up exhibits, auction or displays
- Set up place cards
- Re-confirm agenda with event volunteer staff
- Check with volunteers to make sure all tasks are covered
- Distribute event information to valet & reception staff

Breakdown

- Pack up equipment, supplies and make sure nothing is missing
- Remove all signage and/or posters
- Distribute tips to facility staff
- Return borrowed or rented equipment

Post Event

- Distribute thank you letters
- Pay bills
- Debrief