

WellSpan Philanthropy

Third-Party Fundraiser Toolkit



Thank you...

for your interest in planning an event or program to help raise funds to support WellSpan's mission and benefit the health care needs of our communities. As a community-based, not-for-profit health system, WellSpan Health is very thankful for individuals and organizations like you who feel passionate about helping WellSpan Health support local needs.

WellSpan's six foundations and WellSpan Philhaven work to sustain the health system's many services and programs and endow new programs that ensure the health of our fellow neighbors. The funds raised by each WellSpan Philanthropy office stay within their own community and 100 percent of every contribution supports the program donors designate – there are no administrative costs deducted from donations.

There are numerous programs and services you or your organization can choose to support, representing varied wellness topics and health conditions. If you want to help, we can find a cause to match your interest! Whether it be the health of newborn infants, nutrition programs, mental health programs, cancer patient help or the care of our senior population, WellSpan's commitment to serving people in all stages of life offers many opportunities for support.



What is WellSpan Philanthropy?

WellSpan's efforts to improve the health of our local communities is supported by the health system's six community-based foundations and development efforts at WellSpan Philhaven. Their efforts support the charitable endeavors of WellSpan Health entities, which include:

- WellSpan Chambersburg Hospital
- WellSpan Ephrata Community Hospital
- WellSpan Evangelical Community Hospital
- WellSpan Gettysburg Hospital
- WellSpan Good Samaritan Hospital
- WellSpan Medical Group
- WellSpan Philhaven
- WellSpan Surgery & Rehabilitation Hospital
- WellSpan VNA Home Care
- WellSpan Waynesboro Hospital
- WellSpan York Hospital

How will this toolkit help me?

This toolkit was designed to help make planning your community fundraiser as easy as possible. Feel free to use our suggestions and ideas at any time.

Where will our donation go?

There are many different initiatives your donation could support. If you have a specific interest, we will ensure your donation supports that initiative. If you would like to know what fundraising initiatives are available, please visit WellSpan.org/Foundations or contact one of the following WellSpan Philanthropy offices:



Ephrata Community Health Foundation
(717) 466-2440

Evangelical Community Hospital Foundation
(570) 522-2685

Gettysburg Hospital Foundation
(717) 337-4175

Good Samaritan Hospital Foundation
(717) 270-7864

Summit Health Foundation
(717) 267-7794

WellSpan Philhaven
(717) 270-2402

WellSpan York Health Foundation
(717) 851-3595

Event Guidelines:

We are excited that you are interested in hosting a fundraising event or program to support WellSpan Health. To help make your event a success, please read and review the toolkit before completing the application form. To better understand your fundraising event or program, the application form must be submitted so we have a clear understanding of your plans.

- **Event Qualification**

- There are many ways your organization can make a difference in the lives in your community. Listed below are some ways you can help:
 - Office Jeans Day
 - Bake Sales
 - Coin Drive
 - Fun Runs
 - Walk a Thon
 - Sports Tournament
 - T-Shirt Sales
 - Pot Lucks
 - Craft Sales
 - Movie Night
 - And many more!

- **Event Application**

- Those interested in planning an event or program, please submit a completed and signed application 90 days prior to the event or program. Your application will be reviewed to ensure the proposed event is consistent with WellSpan Health's mission, vision and values. Please do not be discouraged if you are past the 90-day window. If you are past the 90-day window, please submit your application as soon as possible and we will see what we can do. We will contact you when we receive the application.

- **Event Timing**

- Please allow 30 days for the WellSpan Philanthropy office to review and respond to your application. It is the responsibility of staff to approve the fundraising date to avoid potential

conflicts and allow sufficient time between events to maximize support, enthusiasm and attendance. Conflict with existing WellSpan Health events is discouraged but is not the sole criteria when approving third-party events. Once an approval is provided, let the event planning begin!

- **Event Promotion and Logo Use**

- The WellSpan Philanthropy office must review all promotional materials (including but not limited to: press releases, public service announcements, scripts, posters, brochures) at least 30 days before they are used.
- All WellSpan Health logos are registered trademarks and cannot be legally reproduced without permission.

- **Small Games of Chance License**

- If you are conducting small games of chance during your event, you must contact the appropriate License Board to apply for a license.

- **Financial Guidelines**

- WellSpan Health's sales tax exemption certificates cannot be used for purchases relating to your fundraising events or activities.
- We recommend the event expenses be less than 50 percent of the total raised, excluding in-kind donations.

However, your event is responsible for event budget and financial performance. If the event expenses are greater than the total collected, the group conducting the event is responsible for the payment of the additional expenses.

- Within 30 days after the last day of the event, please send a check with all the event proceeds, payable to:

WellSpan Philanthropy Gift
Processing Center
P.O. Box 1281
Lebanon, PA 17402-1281

- **Sponsorship**

- WellSpan Health cannot solicit sponsors for your fundraising event or program. We may request that you refrain from soliciting specific sponsors who are already supporting other WellSpan events.
- Before soliciting cash or gifts, please contact the appropriate WellSpan Philanthropy office for a list of restricted sponsors. Contact information for the WellSpan Philanthropy offices can be found on page 3.

- **In-Kind Sponsorship**

- In-kind sponsorship is defined as a donation of a product or service such as food, beverage, printing or silent auction items.
- WellSpan Health cannot solicit in-kind sponsors for your event or provide in-kind support from our WellSpan Philanthropy offices or any other WellSpan entity.

- **Changes and Cancellations**

- We understand that unexpected circumstances arise with event planning. In the event your fundraising event has changes or needs to be canceled, you must immediately advise our WellSpan Philanthropy office of any material changes in your fundraising event.

- **Liability**

- You will be responsible for furnishing liability insurance for all activities, list the preferred WellSpan Philanthropy office as additionally insured and provide a certificate of insurance to the WellSpan Philanthropy office at least 30 days prior to the event.
- You agree to indemnify and hold harmless WellSpan Health, WellSpan York Health Foundation, Gettysburg Hospital Foundation, Ephrata Community Health Foundation, Evangelical Community Hospital Foundation, Good Samaritan Hospital Foundation, Summit Health Foundation, WellSpan Philhaven and all officers, directors and employees from all claims and liabilities in any way related to the event.
- Third-Party Fundraising events and programs must comply with all relevant state and federal laws.

- **Solicitation of WellSpan Health patients, visitors or employees by non-employees is prohibited.**

Third-Party Fundraising Application

Thank you for your interest in supporting WellSpan Health and WellSpan Philanthropy.

1. Background Information

Name of Group/Company Planning Event: _____

Contact Person: _____ Title: _____

Mailing Address: _____

Telephone: _____ Fax: _____

Email: _____ Website: _____

Please indicate the category that best describes your group:

Corporate School Service Club Family Grateful Patient Other _____

2. Event/Fundraising Information

Name of proposed event: _____

Briefly describe the event and how funds will be raised: _____

What inspired the decision for you or your group to fundraise for WellSpan Health? _____

Date(s): _____ Time(s): _____

Location: _____

Address: _____

Are you soliciting sponsors for your event? Yes No

If yes, please list the confirmed sponsors. _____

Will other charitable organizations benefit from this initiative? Yes No

If so, please list: _____

Is a license required for this event? Yes No

If yes, what type? Lottery Raffle Liquor Other: _____

The person requesting the event must obtain any necessary permits or licenses, in their own name or the name of their organization.

Please submit copies prior to event.

3. Promotional Materials

All logos of WellSpan Health and its entities are registered trademarks, the use of which is restricted. In keeping with industry standards, WellSpan Health will only permit use of its logo to those organizations that have a substantial, established relationship with the organization. In those cases, any use of the WellSpan Health logo or name for the proposed event must be approved by WellSpan Health prior to being printed and/or released.

Please note that while you may possess a copy of the logo from a previous initiative, WellSpan Health must approve any subsequent usage of the logo.

Printed materials and other information should state the "Proceeds will support the beneficiary."

4. Public Relations Information

Will you be promoting your event? Yes No

Would you like to have WellSpan Health Staff/Board of Directors participate in your event? Yes No

Which of the following will you be using to publicize your event?

Internal promotion such as newsletters: _____

Posters/Flyers: _____

Advertisements: _____

Public Service Announcements: _____

Other: _____

What is the estimated duration of the promotional activities? _____

What is your estimated net revenue for this event? _____

Return this completed form to:
WellSpan Philanthropy
Gift Processing Center
P.O. Box 1281
Lebanon, PA 17042-1281

Terms and Conditions

I/We have read the Event Guidelines and, if this proposed activity is approved by WellSpan Health and WellSpan Philanthropy, we agree to abide by all conditions set forth in the event guidelines and/or outlines specifically for this proposed activity.

Specifically, I/We agree that:

- The named "person in charge" of proposed activity has the authority to enter into this agreement. WellSpan Health and WellSpan Philanthropy are not responsible for any debts or costs incurred as a result of this activity. I/We agree to hold WellSpan Philanthropy and WellSpan Health harmless against the action of any creditors. In addition, the applicant agrees to appropriately handle and safeguard all funds received, and in a timely manner, deposit the proceeds intended for the WellSpan Health beneficiary and transfer those funds to the appropriate WellSpan Philanthropy office for processing.
- Any printed materials, press releases, etc. mentioning WellSpan Philanthropy or WellSpan Health will be submitted for approval prior to use. I/We further understand that approval of proposed activity does not constitute permission to use WellSpan Philanthropy or WellSpan Health logos in any materials, as such use is restricted to entity-sponsored events.

Terms accepted by:

Signature of applicant: _____

Date: _____

Reviewed by: _____

Frequently Asked Questions

Can I use WellSpan Health or WellSpan Philanthropy names and logos? WellSpan Health must review all promotional materials (including but not limited to: press releases, public service announcements, scripts, posters, brochures) at least 30 days before use. WellSpan Health and WellSpan Philanthropy logos are registered trademarks and cannot be legally reproduced without permission.

When will I receive approval on the fundraising event or program? Please allow 30 days for WellSpan Philanthropy to review and respond to your application. Conflict with existing WellSpan Health events is discouraged but is not the sole criteria when approving third-party events. Once approval is provided, let the event planning begin! (If your event is less than 90 days away, do not be discouraged. Apply anyway and we will see what we can do! We suggest to give us a heads up on the short turnaround time.)

Can someone from WellSpan Health help me plan my fundraiser and attend? We are happy to provide guidance, but we do not have the resources to help handle the organizational or administrative tasks that come along with planning a third-party event. We will do our best to attend the fundraiser and will provide guidance as much as we can leading up to and during the event. However, we cannot guarantee attendance from volunteers and staff at your event.

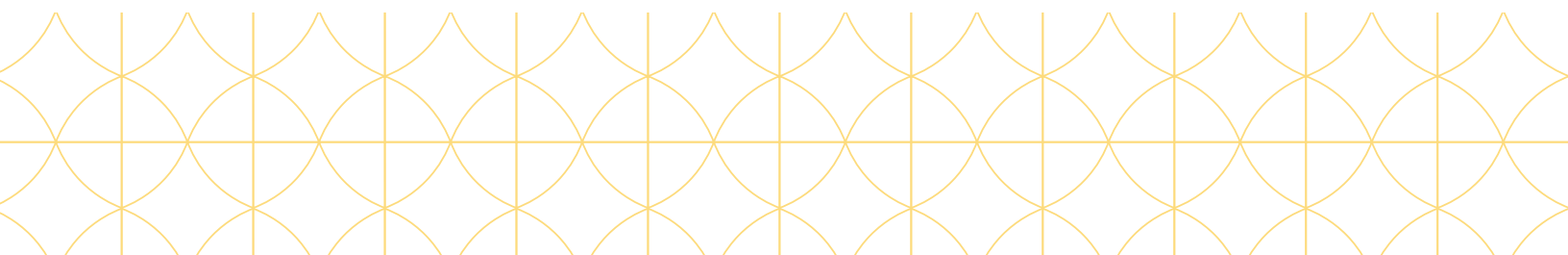
Can I use WellSpan Health's Tax-Exempt Number? No, WellSpan Health's sales tax exemption certificates cannot be extended for purchases related to your fundraising event.

Will each of my donors get a receipt for their donation? WellSpan Philanthropy cannot issue a charitable tax receipt to donors or sponsors who make donations to your third-party fundraiser.

Can we have a check presentation? Yes! We would love to host a check presentation or be a part of the presentation. Just let us know and we will try to accommodate.

Should I send a personal thank you letter to my donors or anyone who attended the event? Absolutely! A personal thank you goes a long way and shows you appreciate their donation. This will help ensure successful events in the future.

We will do our best to attend the fundraiser and will provide guidance as much as we can leading up to and during the event.



Don't Forget!

Here are some tips to help make your event a success.

Before your fundraiser:

- Get approval from WellSpan Philanthropy
 - Complete and sign the event application, then return it to the WellSpan Philanthropy office at least 90 days prior to your event.
- Have all uses of WellSpan Health logo approved BEFORE distributing.
 - All promotional and publicity materials must be approved by WellSpan Philanthropy to ensure you are using the WellSpan Health name, logo and charitable language correctly.
- Plan a budget.
 - Identify sources of income and all expenses. If you keep the costs down you may generate a larger donation – something everyone will feel good about.
- Identify your audience.
- Establish goals.
 - Make sure they are realistic and measurable.

The day of your fundraiser:

- Take photos!
 - Photos are the best way to capture your amazing fundraiser. It also helps to document it. Make sure you take a ton of photos so you can use them for the future. Don't forget to get a photo release signed!
- Thank everyone for their support.
 - A thank you goes a long way. Thanking your supporters and donors throughout the event will help make your event a success.



After your fundraiser:

- Within 30 days after the last day of the event, please send a check with all the event proceeds, payable to the WellSpan Philanthropy office of your choice. The check can be mailed to:

WellSpan Philanthropy Gift
Processing Center
P.O. Box 1281
Lebanon, PA 17042-1281
- Send us photos. We enjoy seeing your successful efforts to help improve our community!
 - Email three to five photos from your event to: philanthropy@wellspan.org
- Have an after-fundraiser meeting to plan for next year.
 - The application and related documents you submit for the event are only valid for that event. You must submit a separate application for each event, even if you already received permission in a previous year for the same or similar event.