



# SPECIAL EVENTS

## THIRD-PARTY FUNDRAISING EVENT GUIDELINES AND APPLICATION

Thank you for your interest in hosting an event to benefit Gundersen Medical Foundation. We are always grateful for the generous support of people like you who share our commitment to improve the health and well being of our communities. Your generosity is what enables us to support programs that benefit you, your loved ones, friends and neighbors.

**GUNDERSEN**  
MEDICAL  
FOUNDATION



# GUIDELINES FOR THIRD-PARTY FUNDRAISING

Here are some guidelines to help you as you plan your event. We'll work with you to ensure the best possible outcome for your event by approaching donors in a coordinated way.

- 1 | If you, your business or organization wish to host an event benefiting Gundersen Medical Foundation please complete an event application. Gundersen Medical Foundation's Development Office will review and send you approval.
- 2 | Until we can review and approve your event application, please do not make any public announcements or promote the event in any way.
- 3 | Please submit your application at least 10-12 weeks in advance of the proposed event date. Remember, applications for annual events need to be re-submitted each year.
- 4 | Events should fit the mission and image of Gundersen Medical Foundation.  
**Our mission is to improve the lives of patients and our larger community through medical education, research, outreach and philanthropic support of Gundersen Health System.**
- 5 | We may not be able to give you the go-ahead for your event if it competes or conflicts with an already established event benefiting Gundersen Health System.
- 6 | All event materials and publicity, such as advertising, press releases, posters, fliers, buttons and t-shirts, with Gundersen Medical Foundation name and/or logo have to be reviewed and approved in advance by the Development Office.
- 7 | Gundersen Medical Foundation is the beneficiary, not the sponsor or host, of any benefit events. Publicity should list the name of the event followed by "...to benefit Gundersen Medical Foundation." If your gift is designated for a particular Foundation program or service, please list that as the beneficiary (e.g., "...to benefit the Carilee Fund of Gundersen Medical Foundation").
- 8 | Inform the public how Gundersen Medical Foundation will benefit from the event. If the Foundation will not receive 100 percent of the net proceeds, state the exact percentage or amount on all related publicity.
- 9 | If another organization, in addition to Gundersen Medical Foundation, will benefit from the event include that on your application.
- 10 | Solicitation of businesses that use the Gundersen Medical Foundation name and/or logo(s) needs to be approved in advance by the Development Office. Many businesses already support Gundersen Medical Foundation and may not wish to make additional donations.
- 11 | The event organizer is responsible for all expenses.
- 12 | Gundersen Medical Foundation cannot be responsible for event ticket sales, sponsorships or assisting with sales of a product for fundraising activities.

- 13 | Gundersen Medical Foundation cannot provide state tax exemption for event-related purchases.
- 14 | Gundersen Medical Foundation cannot guarantee on-site event attendance by employees, patients, physicians or volunteers.
- 15 | Funds should be collected and forwarded to the Foundation within 30 days of your event or promotion along with a copy of the event contract. Please make your donation in a lump-sum check made payable to:  
**Gundersen Medical Foundation  
Office of Development  
Attn: Special Events  
1836 South Avenue  
La Crosse, WI 54601**
- 16 | Don't forget to obtain any necessary permits, insurances and licenses (such as raffle and liquor licenses).
- 17 | Gundersen Medical Foundation and all related entities cannot assume any type of liability for your event.
- 18 | If circumstances warrant (e.g., any illegal actions, negative exposure, etc.), Gundersen Medical Foundation may request that you cancel the event and release Gundersen Medical Foundation and its officers and employees from any and all liability.

## Gundersen Medical Foundation can help support your event

- Provide a letter of authorization to be used to validate the authenticity of the event.
- Provide and approve use of logos.
- Attend the event or check presentation, as schedule allows.
- Assist donors in directing contributions toward areas of special interest or areas of need within Gundersen Health System.
- Promote the event on the Gundersen Medical Foundation website and other appropriate internal media resources. We must receive promotional information at least four weeks prior to your event.
- We may be able to provide gift receipts for tax purposes to donors who make tax-deductible contributions payable to Gundersen Medical Foundation. We cannot provide gift receipts for non-gift transactions, such as ticket sales, purchases, raffle tickets, etc.
- Payments made partly as a gift and partly in consideration for goods or services the donor received, may receive a receipt for the gift amount only; the value of the goods or services received are not tax-deductible. ***We will need to discuss in detail before the event.***



# SPECIAL EVENTS APPLICATION

Please submit the following application for approval prior to conducting your event to benefit Gundersen Medical Foundation.

## CONTACT INFORMATION

Today's date \_\_/\_\_/\_\_

Name of group/company planning event \_\_\_\_\_

\_\_\_\_\_

Name of individual responsible \_\_\_\_\_

Mailing address \_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email address \_\_\_\_\_

Organization's website \_\_\_\_\_

Phone \_\_\_\_\_

Alternative phone \_\_\_\_\_

Fax \_\_\_\_\_

Briefly describe your organization \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is your organization ☐ Nonprofit ☐ For profit

Why did you choose Gundersen Medical Foundation to be the beneficiary of your event? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have you held a fundraising event before? ☐ Yes ☐ No

If yes, list the most recent fundraising event you worked on and its beneficiary. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What support, if any, will be requested from Gundersen Medical Foundation? \_\_\_\_\_

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\_\_\_\_\_

## EVENT INFORMATION

☐ One-time event ☐ Annual event ☐ Ongoing project

Name of proposed event. \_\_\_\_\_

Briefly describe your event. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date \_\_/\_\_/\_\_ Time \_\_\_\_\_

Location \_\_\_\_\_

Is the event ☐ Open to the public ☐ By invitation only

Have you formed a committee to help organize this event?

☐ Yes ☐ No

If no, who will support you in your efforts?

\_\_\_\_\_

\_\_\_\_\_

Is Gundersen Medical Foundation the sole beneficiary?

☐ Yes ☐ No

If no, please list other beneficiaries.

\_\_\_\_\_

\_\_\_\_\_

How will the funds be raised? ☐ Ticket sales ☐ Sponsorships\*

☐ Auction/Raffle ☐ Other \_\_\_\_\_

\* Please attach information on sponsorships including full amount of sponsorships and fair market value of goods and services received. Monies given to purchase tickets, auction items, raffle tickets, food, etc. are not considered charitable gifts.

Who will you solicit? ☐ Friends ☐ Family ☐ Clients

☐ Co-workers ☐ Others \_\_\_\_\_

Local businesses (list businesses to be solicited for event)

\_\_\_\_\_

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# SPECIAL EVENTS APPLICATION

Please submit the following application for approval prior to conducting your event to benefit Gundersen Medical Foundation.

How will expenses be paid?

☐ From proceeds ☐ By event organizer

Anticipated total funds raised

\$ \_\_\_\_\_

Anticipated total expenses

\$ \_\_\_\_\_

Anticipated donation to Gundersen Medical Foundation

\$ \_\_\_\_\_

Where would you like your funds directed? \_\_\_\_\_

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How will you promote this event? \_\_\_\_\_

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- ☐ I agree that Gundersen Medical Foundation will receive proceeds from the event within 30 days of the event.
- ☐ I agree that all printed materials and publicity for the event must be approved by Gundersen Medical Foundation prior to being released, posted online, printed, etc.
- ☐ I have read the Guidelines and Application for Fundraising Events for Gundersen Medical Foundation and agree to follow them as stated.

Print name \_\_\_\_\_

Signature of applicant \_\_\_\_\_

Date \_\_\_\_\_

**PLEASE RETURN FORM TO:**

**Gundersen Medical Foundation  
Office of Development  
Attn: Special Events  
1836 South Avenue  
La Crosse, WI 54601**

For Development use only:

Approved by \_\_\_\_\_

Date approved \_\_\_\_\_

**If you have any questions or would like more information about organizing a fundraising event to benefit Gundersen Medical Foundation, please contact the Development Office at (608) 775-6600 or (800) 362-9567, ext. 56600.**





## ABOUT GUNDERSEN MEDICAL FOUNDATION

For more than 70 years, Gundersen Medical Foundation has connected supporters with an interest we all share—the health and well-being of our community. Through the Foundation, Gundersen is able to evolve and innovate to stay at the forefront of patient care. The Foundation sponsors a major medical education program, multi-faceted research efforts and outreach activities to improve community health.



**SHARE**the  
MISSION WITH US

## STEPS FOR ORGANIZING A SUCCESSFUL EVENT OR PROMOTION

- 1 | **Find something you're passionate about**  
Building on something you love will not only make the event planning easier, but it will also ensure you will have fun doing it.
- 2 | **Establish details**  
The type of event you choose should fit the size, interest, talents, goals and time availability of your committee. Think date, time, venue, anticipated guests and theme. Avoid major holidays, school vacations and other events as this may affect attendance. Give yourself and your committee plenty of time to plan and promote the event.
- 3 | **Develop a budget**  
How much will it cost for supplies? Will there be a charge for the room/hall/event space? What can you get donated? These are just a few questions you will need to figure out as you develop your event. We are here to help you if you have questions.
- 4 | **Involve family and friends**  
Planning an event can take a lot of time and effort. Don't do it alone. Get friends and family to help. Sharing responsibilities will boost the fun and impact of your fundraiser.
- 5 | **Don't forget to apply**  
Once you have a plan and you are ready to take the next step, apply to Gundersen Medical Foundation's Development Office. Your application lets us know what type of fundraiser you're planning so we can guide you appropriately.
- 6 | **Promote and publicize**  
Develop a plan for generating buzz. Local newspapers and magazines are great, but don't forget your church or employer bulletins. Distribute flyers in your neighborhood and local businesses. Use social media sites like Facebook, Twitter and LinkedIn to promote the event. Don't forget to talk it up to friends, neighbors, co-worker and fellow club members! Word-of-mouth can sometimes be your best advertising.
- 7 | **Conduct your fundraiser**  
Now it's time for all your hard work to pay off! Remember to have some fun yourself and enjoy the fruits of your labor. You've earned it!
- 8 | **Collect the funds**  
All funds should be collected and forwarded to the Foundation within 30 days of your event or promotion.
- 9 | **Thank you**  
It's important to thank your donors and volunteers. We suggest you send your thank you letters or cards within one week of your event.
- 10 | **Consider making your fundraiser an annual event**  
Organize a follow-up meeting with your committee to discuss and evaluate your event. Discuss with your committee members and volunteers what worked and what did not so you are better prepared for next time. We hope you consider making your successful event an annual event to benefit Gundersen Medical Foundation.

We ask that annual events re-register every year to help our team provide as much support to you as possible.

**So, take the first step. Complete the proposal form and return it to:**

Gundersen Medical Foundation  
Office of Development  
Attn: Special Events  
1836 South Avenue  
La Crosse, WI 54601

If you have any questions or would like more information about organizing a fundraising event to benefit Gundersen Medical Foundation, please contact the Development Office at (608) 775-6600 or (800) 362-9567, ext. 56600.



**1 | What is a fundraising event?**

A fundraising event is an organized activity or social function held for the purpose of raising money for a charitable organization. Fundraising events range from dinners to walkathons.

**2 | When will I know if my fundraiser is approved?**

Most community fundraising activities are approved within 10-14 days of receiving the application. Make sure to fill in all the fields on the application to help avoid delays.

**3 | Can we use the Gundersen Medical Foundation name and logo?**

Once your fundraiser is approved, we will provide you with the appropriate logo for your marketing materials. We must review everything with our name and logo before it's printed, posted online or distributed.

**4 | Can someone from Gundersen Medical Foundation attend and/or speak at my event?**

Because of the large demand on clinical and support staff time, we can't guarantee attendance of physicians or staff at your fundraiser.

**5 | Can I use Gundersen Medical Foundation's 501(c)(3) federal tax identification number?**

If a business makes a donation to your event and they require proof of Gundersen Medical Foundation's tax-exempt status, we can supply this directly to them.

**6 | Do I need to create a 501(c)(3) (non-profit) organization to host a fundraiser for Gundersen Medical Foundation?**

Anyone can host a fundraiser for Gundersen Medical Foundation with our approval. If you are currently with an organization that claims 501(c)(3) status and people make donations payable to your organization, Gundersen Medical Foundation cannot provide them with a charitable tax receipt.

**7 | Can Gundersen Medical Foundation issue gift receipts to my donors for tax purposes?**

Contact us prior to the event to discuss. Since you are not an agent of the Foundation, you may not issue gift receipts for donations made to Gundersen Medical Foundation.

We cannot provide gift receipts for non-gift transactions, such as ticket sales, purchases, raffle tickets, etc. We will issue receipts for gifts only. The value of goods or services the donor received are not tax-deductible. ***We will need to discuss in detail before the event.***

**8 | Are there any guidelines regarding sponsorships and in-kind donations?**

Having a sponsor is a great way to offset the costs of your fundraiser. Over the years, Gundersen Medical Foundation has developed relationships with businesses and vendors in our community. To avoid duplicate solicitations, please notify our Development Office before asking area businesses or vendors for sponsorship, donation, cash or in-kind gifts. If you are not with a 501(c)(3) status organization, please do not promise a charitable tax receipt.

**9 | Does Gundersen Medical Foundation provide event insurance?**

Because Gundersen Medical Foundation is the beneficiary and has no direct involvement with running the fundraiser, we do not provide event insurance. The fundraising coordinator is responsible for obtaining all required permits and certificates of insurance.

**10 | Should I send a personal thank you letter or card to my donors?**

Definitely! It is important to thank everyone who was involved with your fundraiser. We suggest you send a thank you letter or card within one week after your fundraiser. Don't forget to thank your volunteers and committee members, too!