



## **Third-Party Fundraising Toolkit**

As a non-profit organization, Hospice Care Plus (HCP) is grateful for the generosity of individuals and organizations who support our mission by hosting a fundraiser. These events include everything from lemonade stands, bake sales, benefit rides, tournaments, concerts, car shows, and more and occur in the six counties we serve: Estill, Jackson, Lee, Madison, Owsley, and Rockcastle.

Fundraisers hosted by community members or groups are called third-party fundraisers. They are incredibly helpful to us as we care for patients and families. As a small organization, our staff is already committed to a slate of HCP-hosted fundraising events and donor activities throughout the year. We do not have the staff to support adding additional fundraising events. By hosting a third-party fundraiser, you make additional events possible and increase the support we can provide to patients and families.

If you are interested in hosting your own third-party event to benefit HCP, please contact Stefanie Manes or Melanie Hacker at 859-986-1500 or [development@hospicecp.org](mailto:development@hospicecp.org). We would be pleased to offer guidance to help make your event a success.

### **Overview**

#### ***What is a third-party fundraiser?***

A third-party fundraiser is an event planned and implemented by an individual, community group, or organization for which HCP is the chosen beneficiary.

#### ***Who can conduct a fundraiser on behalf of HCP?***

Anyone can host a fundraising event: families, civic organizations, churches, schools, businesses, government agencies, etc.

#### ***How will this toolkit help me?***

This toolkit is designed to make planning your community fundraiser as easy as possible, while following the procedures set in place for all third-party events. From creating a timeline to organizing and publicizing your event, it is a complete planning guide that will allow anyone to become a successful fundraiser for HCP.

### ***Where will my donation go?***

There are four funds that your donation can be assigned to: the Compassionate Care Center Fund, the Palliative Care Program Fund, the Grief and Loss Support Fund, or the Hanan Budeiri Legacy General Fund, which supports all programs and can be directed to areas of greatest need. If you have a passion for a specific program, we will work with you to ensure your donation goes to that program's fund. Any donation not designated will automatically go toward the general fund.

### ***How can HCP help me with this event?***

Listed below are ways HCP can help with your fundraiser:

- Provide consultation on planning fundraisers and events
- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Help publicize, promote, and thank supporters through HCP's social media platforms
- Help you select a fund for your donation to support
- Coordinate check presentations
- Give you guidance on publicizing your event
- Give you permission to use our name in promotion of the event (Hospice Care Plus)
- Send you HCP branded giveaways (e.g., hats, T-shirts, etc.)

We are here to support you. However, we are **unable to provide** the following services:

- Use of the HCP logo or any graphic included in our graphic identity – third-party fundraisers are not permitted to use any Hospice Care Plus logo for legal reasons (but you are encouraged to use our name)
- Our sales tax exemption number and/or certificate
- Tax letters to individual donors or sponsors
- Insurance or liability coverage
- Mailing list of donors and/or vendors
- Use of HCP stationery
- Funding or reimbursement of your expenses (certain expenses may be tax-deductible)
- Paid advertising (e.g., newspaper, radio, television, printing)
- Publicity services beyond promoting your event on our social media platforms
- Unbudgeted dollars to cover expenses of the event without CEO approval
- Guaranteed attendance of HCP staff, physicians, volunteers, or patients

### **Getting Started**

1. **Form your planning committee:** Bringing together a group of enthusiastic and dedicated volunteers who share an interest in raising money for a great cause will increase the probability of a successful event.
2. **Brainstorm:** Ask the committee to brainstorm ideas for your fundraiser, such as available spaces and who to approach for event sponsorship or donations. Use your imagination! Then, delegate tasks among the committee to begin reaching out to your contacts.
3. **Choose the right type of event for your community:** The type of event you choose should fit the size, interests, talents, goals, budget, and time availability of your planning committee.

4. **Identify your target audience:** Consider who is most likely to attend and support the type of event you have selected.
5. **Consider your resources and develop your budget:** Try to identify all the expenses involved with your event (invitations, postage, rental space, signage, food and catering, promotional materials, website, advertising, etc.). Then, think about sources of funds, people, and companies you know who may be able to donate products (food, venue, equipment) or services (design, printing, photography) to reduce your costs. This will help keep your costs down, which is something everyone will appreciate. We encourage you to maintain fundraising costs at 30% of your budget. Remember: free is best! When possible, always inquire about donations of goods and services.
6. **Develop an event timeline:** A timeline is important in planning a publicity strategy for your event.
7. **Schedule the event:** Select a time that is appropriate and convenient for those who will be attending. Be sure to check with HCP and local community calendars for conflicting events. For info on the HCP calendar, contact [development@hospicecp.org](mailto:development@hospicecp.org) or call us at 859-986-1500.
8. **Open a bank account:** Depending on the size of your event, you may find that you will need to establish a bank account to accommodate incoming revenue and expenses. This can be done by visiting a local bank and creating a business account under your event's name.
9. **Collect all funds:** We ask that all event proceeds designated for Hospice Care Plus be mailed to us within 30 days following the conclusion of your event.
10. **Say "Thank You":** Sending thank-you letters, notes, or e-mails to everyone who participated in or supported your event shows your appreciation and reinforces their goodwill about supporting HCP.

## **Event Ideas**

The following are some ideas for your fundraiser. We suggest thinking of something you enjoy doing (i.e., baking, singing) and adding a fundraising component to that. Having trouble coming up with an idea? Here is a list to help get you started:

**Birthday/Anniversary Party:** Do you have an upcoming birthday, anniversary, shower, or bar/bat mitzvah? Consider contributing to HCP in lieu of personal gifts – and ask your friends and family to do the same. This is a terrific way to get the kids involved!

**Cocktail/Mocktail Party:** Throw a cocktail or mocktail party in your home or at a local restaurant or bar. Many venues provide great deals for very little money. Ask your friends to donate \$50 and then spend no more than \$20 per person on the food. This will ensure you will have a good amount to donate by the end of the night. Include a raffle or auction to increase revenue.

**Garage/Yard Sale:** Ask friends and neighbors to clean out their basement or garage for a compelling cause. Organize a garage sale, and you will clean out your house while supporting seriously ill patients in our community at the same time.

**Sports Tournament:** Round up your golf friends, your bowling league, or your child's softball team and get them involved in a fundraising tournament. Set a modest entrance fee per player/participant, coordinate a bake sale, raffle, split the pot, or silent auction as part of the event, and you have an afternoon of fun while raising money to support our patients and families.

**Business, Church, or School Fundraiser:** Consider hosting a jeans day or casual Friday at work where colleagues can donate \$5 or \$10 and dress down for a worthy cause. Churches might consider hosting a night of singing and request an offering for HCP. Kids love helping! Have fun with your students while teaching them the importance of giving back by having a hat day or hosting a talent show at school.

**Trivia Night:** This is a fun and popular way to raise funds while increasing awareness about the benefits of palliative and hospice care. Pick a popular theme (80's, Disney, etc.) and host your trivia night at a local brewery or restaurant, charge a modest entry fee, and even partner with the brewery or restaurant to donate a percentage of funds from all purchases.

## **Publicity of Event**

### **Use of Hospice Care Plus Name and Logo**

We cannot allow use of the Hospice Care Plus logo for third-party events. However, we do allow use of our name when publicizing your event. Here are two examples of how you could use our name in the publicity of your event:

- *“St. Mary’s Chili Supper benefitting Hospice Care Plus.”*
- *“St. Mary’s Chili Supper. All proceeds support Hospice Care Plus.”*

### **Maximize Your Publicity**

- Utilize both digital and printed marketing tools.
  - Social media is a wonderful way to advertise and publicize your event. We are also happy to publicize your event on our social media outlets.
  - Reach out to your local radio station and newspaper outlets regarding news stories as well as entry in their community events calendars.
  - Visit local shops and restaurants and ask to have your event flyer displayed.
  - When creating your flyers, invitations, and other marketing materials, please make sure to include information on admission prices, how to make reservations, how to donate to the event, and who to contact with questions. Below is a great example of a Facebook photo for a third-party fundraising event:



- Create a marketing timeline for your event. Here is a good example as you put together a publicity plan:
  - **3-4 months before the event:** Identify your target audience based on demographics, interests, and location, and develop a targeted media list. Create your marketing materials (i.e., flyers, invitations, press releases, etc.).
  - **1-2 months before the event:** Distribute media/marketing materials (i.e., event invitations, flyers, Facebook posts, press releases, etc.).
  - **2 weeks before the event:** Make follow-up calls and send emails to the media outlets who received the information.
  - **1-2 days before the event:** Email and/or fax a media alert with the basic information about your event (who, what, when, where, and why) to TV stations, radio stations, and daily newspapers.

### Take Photos

Photos are a great way to document your event, whether for publicity or simply to share with family and friends. Here are some tips on capturing special moments at your fundraiser:

- Inquire with local photographers about donating 2 hours of their time to a good cause in exchange for "free" admission or similar perk.
- Write out a targeted shot list in advance to make sure you get photos of everything and everyone you want. Always try to include 3-4 individuals in a photo for the best publicity shot.
- Is someone special being honored during the event (a local family sharing their hospice story, a public official or honorary chair, etc.)? Get a photo with those individuals, along with your planning committee.

- Take candid and close-up shots that capture the various aspects of your fundraiser, from venue, dancing, food/drink offerings, attire, auction, etc.
- Capture images of your sponsors. This one is important because you want to thank those individuals and businesses publicly for their support.

## **Collecting Funds**

While all members of your planning committee should solicit and collect funds for the event, we recommend that you designate one member of the committee to serve as committee treasurer. This person will be responsible for keeping all collected funds secure and accounted for.

- The best way to ensure funds are kept secure is to open a bank account for the event.
- We encourage that all checks be made payable to the name of the event (i.e., “St. Mary’s Chili Supper”).
- Should you receive any checks written out to Hospice Care Plus, please send those in their original form, along with your final donation, after your event has ended. Those individuals will receive a thank you letter from Hospice Care Plus.
  - HCP is unable to provide individual tax-exempt letters for third-party events.

## **After Your Event**

Once your event has ended, we would love to hear how it went. Give us a call or email us at [development@hospicecp.org](mailto:development@hospicecp.org) and let us know the number of guests in attendance, any special highlights from the event, or anything else you would like to share.

## **Sending Your Donation to Us**

- Please make your check payable to Hospice Care Plus.
- If you collected any checks that were written out directly to Hospice Care Plus, please send those to us in their original form, along with your final donation check.
- Once we receive your final donation, an official acknowledgment letter will be sent to you/your organization for tax purposes.

## **Send Us Your Photos**

E-mail 3-5 of your best photos from the event to [development@hospicecp.org](mailto:development@hospicecp.org)

*\*Please include captions and identify those captured in the photos.*

## **Start Planning Your Next Fundraiser**

The best time to think of a new idea is right after an event or fundraiser. Think of what parts went well and what could be changed to make the next event even more successful.

## **Frequently Asked Questions**

### ***How long will it take to get my fundraiser proposal approved?***

Once received, proposals will be approved within ten business days. Our development team will contact you regarding proposal approval.

### ***Do I need to create my own 501c3 (non-profit) organization to host a fundraiser for HCP?***

No, anyone can host a fundraiser for HCP with our approval. Staff can provide an authorization letter confirming the organizer's intent to raise funds for HCP.

### ***Can someone from HCP help me plan, attend, and/or speak at my event?***

We are happy to provide guidance for your event, but we do not have the staff resources to handle the organizational and administrative tasks associated with planning the details of third-party events. We do our best to attend events supporting Hospice Care Plus, but we cannot guarantee attendance of staff, physicians, or volunteers at your event. We always do our best to provide a speaker.

### ***Can I use HCP's name and logo?***

While we do not allow use of our official logo, we do allow third-party fundraisers to use our name in marketing materials. Please add a brief line to the end of your event's title, which will highlight us as the beneficiary (see "Publicity Tips" for details).

### ***Can HCP help me get a permit for my event?***

The organization and execution of the event are the responsibility of the event organizer. The event organizer must obtain any necessary permits, licenses, or liability coverage.

### ***Can I use HCP's tax-exempt ID?***

Because HCP is not hosting the event, you will not be able to use the HCP charitable classification, federal tax ID number, donated goods form, or tax-exempt certificate. Soliciting donations should be completed through the event name only, with any proceeds benefiting HCP. HCP is not able to provide businesses exempt status for donations.

### ***Will each of my donors get a receipt?***

HCP cannot issue charitable tax receipts for donors or sponsors who make payments directly to your third-party event. If your donor wants a receipt, please be sure the check is made payable to Hospice Care Plus and leave the check in its original form before sending it to us. Please note that there are complex regulations around the distribution of charitable tax receipts. This includes donations of money, in-kind items, and services. Issuing an inappropriate receipt can put our charitable tax status in jeopardy, so please do not promise a receipt.

### ***Can HCP help cover the expenses of my event?***

HCP cannot fund or financially support third-party fundraisers. The event's planning committee will be responsible for covering all expenses and cannot be reimbursed by HCP. For these reasons, as you start to collect money, you may want to keep some funds on hand to help pay your expenses. HCP recommends

that expenses should not exceed 30% of your gross revenue. In your planning process, make sure to develop a budget reflecting the type of event you are having, and the related costs. After the fundraiser is complete, please send us all checks that were made payable directly to Hospice Care Plus as well as one lump sum check from the remaining event proceeds.

***Can we have a check presentation at HCP?***

Yes! We would love to invite you/your committee to have a check presentation at HCP once the event has ended. Please contact us at 859-986-1500 or [development@hospicecp.org](mailto:development@hospicecp.org) when you are ready to schedule a check presentation.

**Contact Information**

Should you have questions about hosting a third-party fundraiser, feel free to reach out to the development team. Their contact info is below:

Stefanie Manes, Development Coordinator  
Melanie Hacker, Development Assistant

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Phone: 859-986-1500

Email: [development@hospicecp.org](mailto:development@hospicecp.org)