

# SAINT MARY'S FOUNDATION

A Member of Trinity Health

## Fundraising Guide

*An informational packet on everything you need to know about planning and hosting a third-party fundraiser to benefit Saint Mary's Foundation/ Trinity Health Saint Mary's.*

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## About the Saint Mary's Foundation

Through philanthropy and stewardship, the Saint Mary's Foundation raises money for Trinity Health Saint Mary's. The goal of our work? To help Trinity Health Saint Mary's continue its mission of fostering good health throughout the Grand Rapids community. All charitable gifts to Trinity Health Saint Mary's are directed and made payable to the Saint Mary's Foundation.

## Getting Started

You've made the choice to host a fundraiser to benefit Trinity Health Saint Mary's. Thank you! Now what? This packet will provide you with answers to common questions, such as: "Who do I call for help?" Additionally, important guidelines that will help make your fundraiser a great success.

### Third Party Fundraisers

A third-party fundraiser is an event or activity that is entirely volunteer-driven and benefits the Saint Mary's Foundation and Trinity Health Saint Mary's.

Examples:

1. A group hosts a dance-a-thon and gives a check with the net proceeds to the Saint Mary's Foundation.
2. A group or individual raises proceeds in connection with an existing event and directs the produced income back to the Saint Mary's Foundation.
  - a. Example: A group forms a team to run in a marathon with pledges directed to the Saint Mary's Foundation.
3. A company decides to host a *jeans day* to raise funds for a Trinity Health Saint Mary's department or program.

### Planning Tips for Organizations or Individuals

- Review the "Fundraising Guidelines" on page 4.
- Make a plan to obtain any permits, authorizations, or insurances needed for your fundraiser.

**Decide:** Do you need a permit or special permission to hold your fundraiser or activity? Does the fundraiser venue require you to obtain liability insurance?
- Make a plan to publicize your fundraiser.

**Decide:** Will one person be responsible for publicity, or will you have a subcommittee? Will you use social media, such as Facebook and Twitter? Do not forget to utilize local community fundraiser calendars.

**Please note:** we ask that all publicity that includes the name/names, or any entities of Trinity Health, is reviewed by Saint Mary's Foundation staff for final approval. This includes both print and digital.
- Keep in touch with us!

**Decide:** Would you like to have information about Trinity Health Saint Mary's available at your fundraiser? Depending on the size of your fundraiser and the amount you expect to raise, we may be able to provide brochures and other promotional items (please contact us for information that is more specific).

## Frequently Asked Questions

### Will the Saint Mary's Foundation be able to help me organize my fundraiser?

Our staff is happy to help you with your fundraiser, however, the amount and type of assistance we can provide is limited. Typically, we are available to answer questions, offer guidance, and provide you with informational brochures you can distribute at your fundraiser. Given enough notice, we will do everything possible to have a Trinity Health Saint Mary's representative attend your event.

Please note that the Saint Mary's Foundation **cannot**:

- Mail or email invitations for your fundraiser
- Provide funding or reimbursement for fundraiser expenses
- Guarantee attendance of employees, patients or patient families, or volunteers at your fundraiser
- Provide insurance or help you obtain permits for your fundraiser
- Act as the primary contact or organizer for your fundraiser

### Are there any fundraisers I cannot hold?

All fundraising activities should fit our mission and reflect a positive image of Trinity Health Saint Mary's and the Saint Mary's Foundation. We cannot endorse fundraising activities that involve the promotion of unhealthy habits or behaviors.

### Are there any rules about how I name my fundraiser?

In naming and publicizing your fundraiser, **Trinity Health Saint Mary's and Saint Mary's Foundation should not be listed in the title**, but rather as a beneficiary of the fundraiser. For example, instead of "Saint Mary's Foundation Golf Outing," say "A Golf Outing to Benefit Saint Mary's Foundation."

### Am I able to split the money I raise between the Saint Mary's Foundation and another charity?

Yes. If you did not include this information on the application, please let us know as quickly as possible. This information should be publicized for guests and supporters.

### Am I able to provide receipts to those who donate to my fundraiser?

No, only the charity can provide a receipt. A receipt will only be issued if the check is made payable to Saint Mary's Foundation.

**Special note about tax deductibility:** Many items are not tax-deductible. A general rule of thumb, if the donor receives a benefit for their gift, it is not tax-deductible. For example, ticket purchases, entry to a fundraising activity, or auction purchases.

### Can I use the Saint Mary's Foundation or Trinity Health Saint Mary's logo in my advertising materials?

Yes! The logo is available; however, we ask that all printed material, including media releases, must be sent to us for approval before being printed or distributed. For additional guidelines about the use of our logos, please refer to the "Fundraising Guidelines" section on page 4.

## Fundraising Guidelines

1. Any fundraising activities must meet the requirements of relevant laws and regulations.
2. Organizer agrees: (a) he or she will comply with all applicable laws during the planning, promotion, and conduct of the fundraiser; (b) all necessary insurance, licenses, and permits will be obtained and will be enforced through the conclusion of the fundraiser; (c) the fundraiser will result in no cost or expense to the Saint Mary's Foundation whatsoever, unless expressly agreed in writing to the contrary; and (d) will indemnify and hold the Saint Mary's Foundation and Trinity Health Saint Mary's harmless from any and all claims of any kind or nature whatsoever arising out of, or in any way related to, the fundraiser.
3. The Saint Mary's Foundation will not assume any legal or financial liability associated with the event.
4. The third-party fundraising event should not conflict with the values of the Saint Mary's Foundation and Trinity Health Saint Mary's.
5. To avoid inadvertently jeopardizing existing relationships, the authorized fundraiser agrees to receive approval from the Saint Mary's Foundation before soliciting corporations, businesses, celebrities, sports teams, or individuals for cash or in-kind donations related to the fundraising activity.
6. Nothing in this document shall be construed to sanction the authorized fundraiser, or any of his or her employees or representatives, to act as an agent of the Saint Mary's Foundation. Thus, for example, the authorized fundraiser may not open a bank account in the Saint Mary's Foundations name, nor may he or she endorse or attempt to negotiate any checks made payable to the Saint Mary's Foundation, all of which must be forwarded promptly to the Saint Mary's Foundation for processing.
7. Organizer is responsible for keeping accurate records for the event. Net proceeds from your fundraiser must be submitted to the Saint Mary's Foundation as soon as possible after your fundraiser. If this requires more than 30 days, please contact the Saint Mary's Foundation to discuss alternate arrangements.
8. All funds must be submitted to the Saint Mary's Foundation no later than 30 days after the event.
9. Any solicitations made in relation to your fundraising activity must specify that: (a) the Saint Mary's Foundation is the benefiting organization; (b) the actual or anticipated portion of the purchase price that will benefit the Saint Mary's Foundation (i.e. portion of t-shirt sales); (c) any maximum or guaranteed minimum contribution amount to be made to the Saint Mary's Foundation.
10. No party may use the Saint Mary's Foundation, Trinity Health Saint Mary's or The Lacks Cancer Center logo, or any Trinity Health entity logo without consent of a Saint Mary's Foundation representative. All material must be reviewed and approved prior to its production and distribution. This includes, but is not limited to, invitations, press releases, newspaper or newsletter articles, etc.
11. Organizer is responsible for recruiting their own volunteers to work on pre-event and day-of event activities.

## Thank you

We appreciate your interest in supporting the Saint Mary's Foundation. With the help of people like you, we are able to further enhance the superior care at Trinity Health Saint Mary's. Together, we can improve the health of our community.

For more information about third-party fundraising events and activities, please contact Angela Paasche at 616-685-1426 or [Angela.Paasche@MercyHealth.com](mailto:Angela.Paasche@MercyHealth.com).

We look forward to having the opportunity to work with you!



**Angela Paasche**

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