

COMMUNITY FUNDRAISING

A step-by-step guide to help plan
a successful fundraiser for
UMass Chan Medical School



UMass Chan
MEDICAL SCHOOL

Advancing
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THE CAMPAIGN
FOR UMASS CHAN

communityfundraising@umassmed.edu

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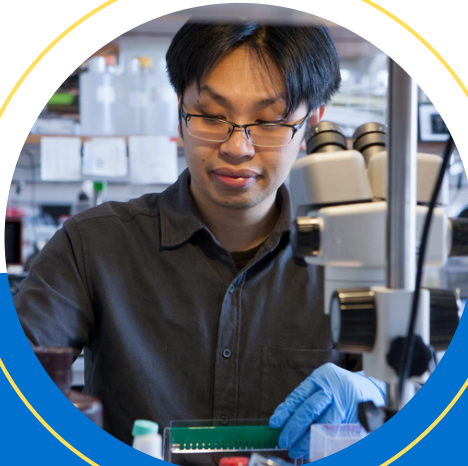


Introduction

The Office of Advancement welcomes your partnership to support the quality research of UMass Chan Medical School. We are dedicated to fostering lasting connections and cultivating new relationships with our community volunteers. Your support, talent, and dedication are essential in carrying out our mission of advancing health and wellness of diverse communities throughout Massachusetts and around the world by leading and innovating in education, research, healthcare delivery, and public service.

At UMass Chan, we're proud of our unique culture of collaboration. We know that conversation can lead to knowledge. Partnerships can inspire discovery. Sharing ideas can shape a brighter future.

We will work with you to make your event a success and help you to plan a fun, well organized event in support of UMass Chan.



For more information, visit umassmed.edu/giving.

About Us

Founded in 1962, **The UMass Chan Medical School** is 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. It is consistently ranked by *U.S. News & World Report* as one of the leading medical schools in the nation for primary care education.

UMass Chan is a world-class research institution, consistently producing noteworthy advances in clinical and basic research. Our researchers have made pivotal advances in HIV, cancer, diabetes, infectious disease, and in understanding the molecular basis of disease. The institution is committed to enhancing health and science education, ensuring community health, building a diverse workforce and enriching lives through extensive community outreach.

Our Role...

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



For more information, visit
umassmed.edu/giving.

Planning Your Event

Community-driven fundraising events play a critical role in driving pioneering education, research and health care delivery, and heightening community awareness of the need for research and scientific medical advances. Some examples of events that have raised funds include golf tournaments, marathons and walks, flower sales, raffles, cornhole tournaments, car races and karaoke.



Choose event
idea



Create a
committee



Find a
venue/date



Create a budget



Sell tickets



Market Your
event



Prepare for your
event



Host your event

Community event information

Thank you for organizing a fundraising event to benefit UMass Chan Medical School. The details of your event are important to us. Please provide us with your event information by completing the enclosed Community Event Information Form **(pg. 8)**. Email, mail or deliver to:

Community Fundraising@umassmed.edu
Office of Advancement
333 South Street, Shrewsbury, MA 01545

How We Can Help

Services We Provide to you and your Committee Members:

- Guidance in creating your event.
- Answer your questions and offer suggestions for your event (*via telephone or planned meeting*).
- A peer-to-peer fundraising page to collect online donations.
- Templates for donation request letters and thank you letters (pgs. 10-11).
- 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/UMass Chan Medical School calendars, social media channels and publications when possible.
- Assist in arranging speakers/guests from UMass Chan to attend your event and/or check presentation. (*Not guaranteed*)
- Donor acknowledgements for gifts.
- Direct donor gifts to designated department(s).

Our staff is here to answer your questions and work with you to ensure a successful event.

Services the Office of Advancement **DOES NOT** Provide:

- Committee meeting space
- Office of Advancement staff or volunteers to attend committee meetings or events
- Mailing or vendor lists
- Funding for or reimbursement of event expenses
- Financial accounting for events (*detail of tickets, raffle, auction, etc.*)
- Receipts valuing in-kind donations
- Design, print and mail invitations



Photo from New England Region SCCA Race Against Leukemia in 2019

Online Fundraising

REGISTER YOUR EVENT

The Community Fundraising Proposal Form must be completed and approved by the UMass Chan Office of Advancement before any fundraising activity or event takes place.

COLLECTING FUNDS

The Office of Advancement has partnered with OneCause to help you raise funds. We will work with you to create a personalized online fundraising page that is powerful, passionate and persuasive, and will help you raise more money.

Please visit p2p.onecause.com/umassfundraising and click “Find an Event” in the top navigation bar to look at some examples of community event fundraising pages.

DESIGN YOUR PAGE

For questions regarding the set up and design of your page, please contact communityfundraising@umassmed.edu

Note:

Funds collected outside of OneCause must be delivered to the UMass Chan Advancement Office. Checks should be made payable to “UMass Chan Medical School Foundation, Inc.” Please note the name of your event in the “Memo” section of all checks.

Photo from the Joe Nozzolillo “Nuzzy” Memorial Golf Tournament in October 2022



Frequently Asked Questions

May I direct the funds that are raised from my event to UMass Chan Medical School?

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 fundraising specialist. When donations are received by the Office of Advancement the funds will be deposited to the specified department or fund.

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 (OneCause). Donations may be sent to our office as they are received or may be delivered after your event takes place. Please do not mail cash.

To whom should donors make their checks payable?

Checks should be made payable to "UMass Chan Medical School Foundation, Inc." The name of your event should be noted in the "Memo" section of all checks.

Does UMass Chan need to review my promotional materials?

Yes. UMass Chan must review and approve all promotional materials including, but not limited to, press releases, public service announcements, posters, brochures and advertising prior to production or distribution. Any promotional materials must clearly state that the event is raising funds to benefit UMass Chan Medical School.

Will the Advancement Office help me promote my event?

Yes. We will share your advertisements on our Giving social media accounts. Please tag us in your post! X: @UMassChanGiving and Facebook: facebook.com/umasschangiving.

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

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

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.

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.

Does the Office of Advancement have a list of vendors that will donate services for my 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. Volunteers have greater success securing vendors that will donate services toward 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.

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

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.

How do I manage my expenses for my fundraising event?

You are responsible for payment of **all** event expenses.

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

We recommend each donor consults with a tax adviser 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 percent 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. (For example, cost of dinner, entertainment, registration fee, etc., are not tax deductible. However, 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 that protects organizers of community fundraising events. We recommend inquiring with your event venue to confirm if they have liability insurance for special events, ensuring protection for you and your committee throughout the event. Consult your local insurance company for guidance regarding your need for Special Event Liability Insurance.

COMMUNITY EVENT INFORMATION FORM

Please complete and submit this form to the community fundraising specialist in 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 _____

Phone number (cell) _____ (Business) _____

Email address _____

Event name _____

Date _____ Time _____

Location _____

Frequency (specify) ☐ Annual event ☐ One-time event ☐ Other _____

Is this event ☐ **in honor** or ☐ **in memory** of an individual/individual(s)?

Name of individual _____

Please provide contact information, and an address _____

Brief description of how funds will be raised _____

Fundraising goal \$ _____

Proceeds from your event will be directed to UMass Chan Medical School Foundation, Inc.

Please specify which department _____



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COMMUNITY EVENT INFORMATION FORM

I would like to create an online donation page created for my event ☐ Yes ☐ No

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.
- UMass Chan Medical may use my event logo(s) and materials to promote this event.
- The 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:

Community Fundraising
communityfundraising@umassmed.edu

Office of Advancement
333 South Street
Shrewsbury, MA 01545

DONATION REQUEST EMAIL TEMPLATE

Please review, with community event specialist, the list of companies you plan to solicit prior to sending your letteres.

Subject: Invitation to Support [Name of Event]

Dear [Contact Person or Business Name],

I hope this email finds you well. My name is [Your Name], and I am reaching out to you on behalf of [Your Organization/Event Name]. We are hosting a fundraiser to support the incredible work being done at UMass Chan Medical School, and we are contacting local businesses to request their support.

[Your Organization/Event Name] is dedicated to [briefly describe your organization and its background]. Our upcoming fundraiser aims to [briefly describe the purpose and goals of the fundraiser, and what research/projects the funds will support at UMass Chan].

We understand that businesses like yours play a crucial role in supporting our community, and we are humbly requesting a gift in-kind donation for our event. Your generous contribution would not only help us raise vital funds but showcase your commitment to the well-being of our community.

Some examples of a gift in-kind donation that would greatly benefit our fundraiser include [Provide examples, e.g., gift card, merchandise, etc.]. Your donation will be used to [Specify how the donation will be used, such as a basket raffle].

We would be honored to feature your business as a valued supporter of our cause. Your contribution will impact the lives of those benefiting from the research and service provided at UMass Chan.

If you require further information or have questions, please do not hesitate to contact me at the number or address below. We hope to gain your support, as it will be crucial to the success of our event. We eagerly anticipate the opportunity to partner with you. Thank you for your time and consideration.

Warm Regards,

[Your Name]

[Contact Information, Include Phone Number, Email and Address]

UMass Chan Medical School Foundation, Inc., Tax Exempt ID 04-3108190



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THANK YOU EMAIL TEMPLATE

Subject: Heartfelt thank you for your sponsorship

Dear [Contact Person or Business Name],

I hope this message finds you well. I would like to express our sincere gratitude for your generous sponsorship of our recent [Fundraising Event].

Thanks to your support, we raised [amount raised], which will directly benefit the [the research/projects the funds are going to] at UMass Chan Medical School.

Your commitment to our cause means the world to us. We couldn't have done it without you.

Thank you again for your generosity. We look forward to our continued partnership.

Warm Regards,

[Your Name]

[Contact Information, Include Phone Number, Email and Address]



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Thank You

For further inquiries and information



Community Fundraising Specialist

communityfundraising@umassmed.edu

Office of Advancement

333 South Street,
Shrewsbury, MA 01545