

Third-Party Fundraiser Event Resources & Toolkit

Welcome

Thank you for supporting Advocate Charitable Foundation and Aurora Health Care Foundation and our mission to help people live well. As a not-for-profit organization, Advocate and Aurora Health relies on the generous gifts made by grateful patients and families, caregivers and friends in the community—people like you—to help us accomplish our mission.

We are incredibly grateful for your interest in hosting an independent third-party fundraising event. Your fundraising efforts will allow us to improve the services and resources available to serve the health care needs of the communities we are honored to serve.

This guide will provide information on how to both plan and host your event, what resources are available to you, and answers to many frequently asked questions.

Event Guidelines

Until the application is approved, the fundraiser may not be promoted in any way, and no announcements can be made.

This application form is not a guarantee of approval. It must be submitted and reviewed to ensure the fundraiser aligns with the mission of our organization, the dates do not conflict with the hospital's calendar, amongst other criteria.

If expenses are greater than money raised by the event, the event organizer is responsible for those expenses. Proceeds must be received within 30 days of the fundraising date or campaign.

How do I apply?

[Click here](#) to apply. Please allow two weeks for review.

Overview

What is a third-party fundraising event?

A third-party event is a fundraising activity hosted by a non-affiliated group, organization, business or individual to raise funds for a non-profit or charity that is planned and executed by the third-party organizer.

How will this toolkit help me?

We hope to provide you with the tools necessary to plan and fundraise for Advocate Charitable Foundation and Aurora Health Care Foundation. This toolkit includes frequently asked questions, tips on how to get started, and what to do before, during and after your event.

Where will my donations go?

One hundred percent of donations for your event will be directed to an Advocate Health Care or Aurora Health Care hospital or program that you choose based on the impact you wish to have. Please contact marina.grant@aah.org for additional information on offerings.

As the event organizer, what are my responsibilities?

As the event organizer, you are responsible for all fundraising efforts and logistics from inception to the day the check/donation is issued to Advocate Charitable Foundation or Aurora Health Care Foundation. This includes obtaining all vendors (venue, entertainment, food/beverage, etc.), necessary permits or licenses, staffing/volunteers, securing auction items, drawing participants to the event and all fundraising aspects associated with your event.

Event name policy

Due to legal requirements, Advocate Charitable Foundation and Aurora Health Care Foundation may not be referred to and identified as the event host. For example, a fundraiser cannot be named Advocate Charitable Foundations Ride for the Kids; instead, it should be titled Ride for the Kids benefiting Advocate or Aurora Health Foundation or a specific hospital site and program.

How Advocate Charitable Foundation and Aurora Health Care Foundation can help you host a third-party event:

- Help finding the hospital, program or specialty area to benefit from funds raised at your event.
- Logo for marketing materials (use of our name or logo must be pre-approved prior to use)
- Letter of endorsement to validate event authenticity
- IRS-compliant tax receipt for donations made directly to Advocate Charitable Foundation or Aurora Health Care Foundation. Check must include the donor name, contact information, event name and be submitted within 30 days of the event. View the FAQ section for more information.

We are here to support you. However, there are services we are not able to provide:

- Advocate Charitable Foundation or Aurora Health Care Foundation tax-exemption number
- Bank accounts or assistance processing or paying expenses
- Insurance, liability coverage or permits, liquor licenses, raffle licenses
- Mailing list of donors, corporate partners or vendors
- Website or registration page
- Letterhead or any type of stationary
- Media publicity
- Celebrity or professional athletes
- Giveaways
- Guaranteed attendance or participation of patients, staff, physicians or volunteers at planning meetings for the event
- Assistance in soliciting donations, handling mailings, attending committee meetings, collecting donations and recruiting attendees
- Guaranteed volunteer or staff attendance at the event

✓ Suggested Checklist

Before your fundraiser

- ✓ **Get approvals.** All third-party fundraising events need to be reviewed and approved prior to moving forward with the event. [Click here](#) to apply. Advocate and Aurora Health Foundations reserves the right to request additional information before reviewing a proposal and has the right to refuse funds raised at unapproved events and activities.
- ✓ **All marketing materials that include the Advocate or Aurora Health logo must be reviewed and approved prior to distribution and publication.** Please allow at least 5 business days for approval of material.
- ✓ **Give your event a personality.** Determine what the event will be and an appropriate name – be creative and make it fun for you and your guests!
- ✓ **Determine a beneficiary.** What fund, hospital site and/or program will the event support?
- ✓ **Establish event goals.** Have realistic and measurable fundraising goals, identify all possible resources of income (sponsorships, donations, ticket purchases, auction, wine pull, etc.) and estimate attendance.
- ✓ **Develop a budget.** Identify all sources of income and expenses associated with all event expenditures.
- ✓ **Timeframe.** Select a date and location that is convenient for those who will be attending and be sure to check local community calendars for conflicting events.
- ✓ **Promote and publicize.** Determine the target audience and how you will promote the event. Social media is an easy, cost effective way to spread the word to your network and the wider community. Create a Facebook event, request support, recruit volunteers, and so much more through your social networks.
- ✓ **Organize logistics.** Venue, food/beverage, tracking RSVP, payments, etc.

At your fundraiser

- ✓ **Thank attendees for their support.** Every dollar makes a difference, be sure to thank your attendees for supporting your fundraiser.
- ✓ **Take photos.** Photographs are a great way to document your fundraising event and share with guests.

After your fundraiser

- ✓ **Send in your donation.** A single check from the event should be made payable to Advocate Charitable Foundation or Aurora Health Care Foundation and state the hospital site name receiving the check. Once we receive your donation, an acknowledgement letter will be sent to you.

Mail checks to:

Aurora Health Care Foundation

Dept 7738074

PO Box 806163

Chicago, IL 60680

Advocate Charitable Foundation

Dept 21058

PO Box 4556

Chicago, IL 60680

- ✓ **Send us photos.** Email the best 5 photos with a brief description and caption from your fundraiser to your foundation hospital site contact.
- ✓ **Review your fundraiser.** Congratulations! You successfully hosted a third-party fundraising event! Now it is time to talk through your successes and areas of opportunity for next year.

Frequently Asked Questions

Can I designate a specific hospital site, program, or service line for my event to benefit?

Yes! Absolutely. You can select any of these options to directly benefit 100% of your event proceeds.

How long does it take to get my third-party fundraising event approved?

Please allow 2 weeks for review and approval.

Can I/we use the Advocate or Aurora Health name and logo on promotional materials?

Once your event has been approved, we will provide you with the appropriate logo for your marketing materials. Materials that include Advocate or Aurora Health, specific hospital site and/or programs must be approved by your fundraising team contact prior to publication and distribution.

Can someone from Advocate or Aurora Health assist with planning the fundraiser and will a team member in attendance at my event?

Advocate and Aurora Health Foundations cannot guarantee the availability of a charity representative for your event. We are happy to provide guidance, but we cannot handle the organizational or administrative tasks necessary to host a third-party event due to limited resources available.

Will Advocate or Aurora Health share my fundraiser internally and or on its social media channels?

We have a standing policy that we do not post about third-party events on our social media channels. We're simply not able to capture all the valuable events and efforts that occur without having our channels completely overtaken by events like these. While we value and appreciate the good work that's being done and the cause it's supporting, we have to stand firm on the policy.

Can Advocate or Aurora Health provide insurance or assist in securing permits and licenses for my fundraiser?

As the event organizer, you are solely responsible for obtaining any necessary permits and clearances required by local and state government, complying with all applicable laws and obtaining appropriate insurance coverage as necessary. Advocate and Aurora Health Foundations cannot be held liable for details associated directly or indirectly with the event, included but not limited to; expenses, purchases, insurance or liability coverage.

Can I organize a raffle?

You may hold a raffle if you have a raffle license and comply with all rules and regulations associated with the license including but not limited to the Illinois or Wisconsin Departments of gaming regulations and the Internal Revenue Service. We cannot provide or “lend” our raffle license or non-profit status to your fundraiser. We cannot endorse any fundraiser that holds a raffle without a license.

Can I/we use the organizations Tax Exemption Number?

No. As a tax-exempt organization, Advocate Charitable Foundation and Aurora Health Care Foundation has the responsibility to use our tax-exempt status only for events and activities directly planned and managed by an agent of Advocate or Aurora Health. We are not able to loan our tax-exempt status to anyone outside of our organization even for purposes of fundraising.

Can I open a bank account to manage revenue and expenses for my event?

Yes. You may establish a bank account to manage incoming revenue and expenses. This can be done by visiting a local bank and creating a business account under your event’s name, excluding the use of Advocate or Aurora Health Foundations, and any sites, programs or funds associated with it.

As the event organizer, you are responsible for all event expenses and will not be reimbursed. Advocate Charitable Foundation and Aurora Health Care Foundation will not be liable for any costs or expenses associated with the event.

Will my event donors receive a tax receipt?

Advocate and Aurora Health cannot issue charitable tax receipts for **donors who make payments directly to your fundraiser**. If your donor would like a tax receipt, have the donor write a check payable to Advocate Charitable Foundation or Aurora Health Care Foundation, with the event name included.

Checks should be sent to:

Aurora Health Care Foundation	Advocate Charitable Foundation
Dept 7738074	Dept 21058
PO Box 806163	PO Box 4556
Chicago, IL 60680	Chicago, IL 60680

Please note, we cannot issue tax receipts for checks related to event tickets and sponsorships that include goods or services as an entitlement, prizes or auction.

We are excited to partner with you, and our team is ready to help ensure your event is a success! If you have questions or need additional information, please contact:

Marina Grant, Director, Events
Advocate Charitable Foundation | Aurora Health Care Foundation
marina.grant@aah.org