

Wolfson Children's Hospital
Giving Circles Guide



Wolfson
Children's
Hospital

Wolfson Children's Hospital Giving Circles Guide

A note from the Baptist Health Vice-President and Foundation Executive Director.

Thank you for considering the establishment of a Giving Circle to benefit Wolfson Children's Hospital, the region's only hospital dedicated solely to serving children.

As a not-for-profit, our ability to deliver services to the children of our community is directly impacted by the resources we have available. At Wolfson Children's Hospital, all children are provided with the highest level of pediatric care, regardless of ability to pay. In 2009, we delivered over \$19 million in uncompensated medical services. Over 40% of the care we provide every year is for children who do not have insurance or the ability to pay.

That's where you come in. Our Giving Circles are a simple way for people like you to help Wolfson Children's Hospital raise money to support its mission. They are easy to organize... they have a clear structure... they provide funds directly to the hospital... and they are fun! You provide the creativity, the people and the passion, and we will do the rest.

We have produced this Guide to help you organize and structure your Giving Circle, with an emphasis on eliminating any guesswork about the process. Consider this your one-stop resource for creating a successful event to help YOUR children's hospital. Read through this guide and develop your plan for a fun, profitable experience.

And that's it! Once you have your idea, your friends and this Guide, you are on your way. If you have any questions, please contact Baptist Health Foundation at 904.202.2250 and we will be happy to help.

Thank you so much for your dedication, commitment and support of the only children's hospital serving the families of North Florida and South Georgia. We, and more importantly, the children, really appreciate it.

Sincerely,



Marlene M. Spalten, CHRE
Vice-President, Baptist Health
Executive Director, Baptist Health Foundation



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What is a Giving Circle?

Giving Circles are a fun way for all-volunteer community groups to come together and creatively raise money to support Wolfson Children's Hospital.

As a not-for-profit organization, Wolfson Children's Hospital depends on the generosity of donors to ensure that the children in our region have the very best healthcare. Over 40% of the care we provide every year is for children who do not have insurance or cannot afford care. At Wolfson Children's, no sick child is ever turned away, regardless of their families' ability to pay. Donations to Wolfson Children's Hospital help support the hospital's growing programs, services and facilities, and give kids a chance at a healthier future.

A Giving Circle is formed by a group of volunteers with a common interest in raising money for Wolfson Children's Hospital. Your group can choose nearly any sort of project – gala events, runs or walks, softball tournaments, bake sales... you name it – and our staff can help guide your choice. Every Giving Circle is unique. Some are small and others are large. The key to success is finding a project that fits the interests of your group. If you love the project, you'll have fun working on it, and it will be successful.

The staff at Baptist Health Foundation, specifically the Giving Circles Coordinator, supports Giving Circles in many ways – from idea generation to keeping finances straight to thanking donors. We're here to help your volunteer group be successful.

Giving Circles provide for the future stability of Wolfson Children's Hospital and ensure our continued legacy of caring for children in our region. By starting a Giving Circle, you will embark on an amazing journey – one filled with inspiring stories about families affected by your acts of generosity.

Your efforts will positively transform the lives of children.



About Wolfson Children's Hospital

Our Vision

As the region's only not-for-profit hospital for children, Wolfson Children's Hospital has a vision to ensure the community's children have access to high-quality pediatric care for generations to come. At Wolfson Children's, no sick child is turned away.

Our Mission

The mission of Wolfson Children's Hospital is to promote optimal health for the region's infants and children by providing patient-and family-centered care, education, research, and child advocacy.

Baptist Health Foundation advances the mission of Wolfson Children's Hospital through philanthropy and stewardship of gifts that enable the hospital to continually serve patients and their families and support community health care needs.

Our Values

At Wolfson Children's Hospital, our philosophy is that caring for children is best accomplished when the care is patient- and family-centered. Care is always offered with respect and dignity. Information is shared.

Patients and families participate in care and decision making, and are part of our collaborative efforts to continue to improve.

Giving Circles reflect the overall philosophy about how, and why, we raise money to support Wolfson Children's Hospital.

We are always **transparent** and **honest** in our fundraising efforts.

Our **integrity** shows in every interaction. Giving Circles raise money for children whose lives have been interrupted by illness and injury, and nothing else.

We **respect** the needs, time, and privacy of patients and their physicians, our donors, and each other.

We consistently seek to **broaden the circle** of friends and supporters of Wolfson Children's Hospital.

We **have fun** with Giving Circle projects!

How Baptist Health Foundation Supports You

The mission of the Baptist Health Foundation is to support current and future community health care needs through philanthropy and fundraising.

Below is a brief overview of some of the ways the Foundation can support your Giving Circle. The Giving Circles Coordinator is available to answer your questions and assist you.

Accounting, Record-keeping, and Tax-deductible Donations

Often the trickiest part of fundraising the right way can be keeping track of your legal and financial obligations. Baptist Health Foundation makes this easy for you by offering extensive support in this area. We take care of the tricky details so you don't have to!

Our support includes use of our 501c3 not-for-profit status so all donations to your event are tax deductible. We provide legal and compliance guidelines to make it easy for your Giving Circle to

understand and uphold all laws and regulations. We provide accounting services, the processing of credit card donations, tax reporting, and IRS-required gift acknowledgement to your donors.

Individual Online Donation Pages for your Giving Circle

The Foundation can provide individual online donation pages that allow you to accept credit card donations or sell tickets in a secure online setting. These pages are part of the Wolfson Children's website so donors know that their donations are going directly to the hospital. If you choose to create your own Giving Circle website, this can also be linked to your Wolfson Children's donation page. Contact the Foundation for details on setting up your donation page.

General Fundraising Advice

Staff at the Foundation can help you with project and fundraising ideas and support. We can give you advice on media and publicity. We provide tools and templates that make it easy to plan and run successful events.



Giving Circle Orientation

Within 30 days of your Giving Circle's formation, the Giving Circles Coordinator will meet with you. This required orientation includes time for you to ask questions and take a tour of the hospital.

Hospital Tours and Meeting Rooms

Hospital tours can be arranged for your Giving Circle, and hospital meeting rooms can be reserved for meetings. All meeting room reservations must be made through the Giving Circles Coordinator, and availability is on a first-come, first-served basis. Please call the Foundation as soon as possible to make arrangements, as meeting rooms fill quickly.

Event Supplies

The Foundation has a variety of supplies you can borrow for your event, including banners, cash boxes, credit card machines and balloons. Please call the Foundation to reserve supplies in advance of your event.

Choosing Your Project

Your Giving Circle project should focus on an area for which your members are enthusiastic. Do you all run? A 5k might be just the thing. Do you all have young children? Perhaps a playdate fundraiser. So long as your idea fits with the Wolfson Children's Hospital message and mission, there are almost no limits on the types of events you can plan. Because we are a children's hospital, we unfortunately do not support adult-themed or gambling events. Beyond that, let your imagination run wild!

Approval of Giving Circle Projects

Once you have an idea, come talk to us at the Foundation to get your project approved and get started. We'll talk through the Project Guidelines listed below to decide whether or not to approve a project. Our staff can help bring clarity to your fundraising idea and help you choose one that will be successful. We have experience in various types of events and can help you figure out how easy or challenging a specific event might be, and what we can bring to the table to support your event.

Project Guidelines

As you consider starting a project, the questions below will help you evaluate various ideas. These are a great way for Giving Circle members to start talking about a specific project.

Project Fit with Wolfson Children's Hospital

- Will this project reflect positively on Wolfson Children's Hospital?
- Is it consistent with Wolfson Children's Hospital mission?
- Will it create new friends, sponsors and supporters of Wolfson Children's Hospital?

Benefits and Costs

- Is the revenue or growth potential high enough considering the time and effort the project will require?
- How much time are Giving Circle members able to contribute?
- What is the expected expense/profit margin? Generally, expenses should be no more than 35% of gross revenue.
- Can the Giving Circle control the expenses or are there any expenses outside your control?
- Is there an "up-front" financial investment? How will you fund this?

Organization

- How many Giving Circle members will enthusiastically participate?
- How many volunteers are needed?
- What staff support do you anticipate from the Foundation?
- Who will act as the coordinator for your Giving Circle?

Where to Start?

Now that you've chosen a project and gotten it approved, the work — and the fun part — begins. In this section, we offer several suggestions and examples to assist you with your Giving Circle.

Roles

While Giving Circles can take whatever form works best for the group, a simple structure with defined roles and responsibilities will make your group run more smoothly and make your project more fun.

- **President:** main contact with the Giving Circles Coordinator, responsible for setting meeting dates and running them timely
- **Treasurer:** responsible for creating a budget for group approval, tracking performance against the budget, and working with the Giving Circles Coordinator for expense reimbursements and vendor payments
- **Secretary:** responsible for taking and keeping meeting notes or minutes

Consider forming sub-committees to handle some of the larger tasks associated with your event. "Decorations," for example, can be done with a team of people and often takes a lot of manpower right before an event. Other functions that benefit from a group effort include soliciting sponsors and donations, invitations, and awareness. Breaking your project into smaller tasks helps spread the workload. Sub-committee leaders can recruit their own team, bringing more members into your Giving Circle. Separating and defining tasks also help an event run more smoothly on the big day as one person takes care of decorations, while another escorts your speaker, and another takes responsibility for working with the caterer, and no one person is spread too thin.

Meeting Agendas

Sometimes finding the time to meet with your Giving Circle can be one of your biggest challenges. While a formal agenda is not required, agendas do make more effective use of your time and help you accomplish your objectives.

Sample Giving Circle Meeting Agenda

1. Introductions

Make sure everyone in the room knows everyone else especially when you have new members in attendance.

2. Review of project goal and event

It's always a good idea to keep your end goals in mind and the mission and vision of Wolfson Children's Hospital. Some groups share inspiring stories to help keep the focus on the kids you're helping.

3. Review project timeline and work plan

A solid timeline and work plan become the backbone of your planning effort. Get updates as appropriate to your dates and stage of your project.

4. Review budget

It's always good to keep an eye on the budget. Are your expenses within the guidelines you expected? Do you need to cut back in any areas or add on in others? Do you have any large payments to vendors coming up? Do you have enough sponsorship funds to cover those payments or will you need to cover them yourself and be reimbursed as you raise funds?

5. Establish next steps

Make sure that meeting notes and an updated timeline and work plan are sent to all members.

Planning

A little upfront organization makes your event easier to run, more successful, and more fun for everyone!

Project Timeline and Work Plan

A timeline for your project is a simple and very useful organizational tool. It puts the project in a calendar perspective and helps your Giving Circle members set priorities on their tasks. Work plans should contain specific tasks, the dates when they are due, and who is responsible for completion of the tasks. A commonly shared work plan literally puts everyone on the same page.

It's helpful to develop the timeline and work plan as a group. This way you reap the benefits of everyone's expertise. And, when you involve everyone with setting dates and expectations, the team as a whole buys into those expectations and dates.

Appendix A contains a sample project timeline and work plan.

Check your dates and reserve your event facilities as soon as possible

Check your date to make sure that it's not the date of some other big event in town or major religious or national holiday. Unless it's a Super Bowl-themed party, don't hold your event on Super Bowl Sunday.

Facilities can be hard to book. Book yours at least two months in advance.

Create a budget

Make sure the goals that you set are attainable. There's nothing wrong with starting small. Once you have the experience under your belt, you can make next year's event bigger and better.

Think through what your expected costs will be and use the planning check list in Appendix A to make sure you're not forgetting anything. **Remember you want to keep expenses at 35% or less of your total revenue.** When pricing your event, consider what events similar to yours cost. In addition to the admission or ticket price, consider other ways in which interested participants can donate – raffles, silent auctions, etc.



Here's a very rough sample budget for a 5k run with 200 runners.

Revenue	
Sponsorships	\$5,000
Runner Contributions	5,000
Total Revenue	\$10,000
Expenses	
Print flyers	\$500
Mailing for sponsorship requests	200
Print t-shirts	600
Fee to city	500
Fee to running organization	750
Water	50
Total Expenses	\$2,600
Net Revenue	\$7,400
Expense ratio	26%

Create a marketing plan

How do you want to advertise your event? What kind of materials will you need to accomplish your goal? Will you need invitations, posters, flyers, or brochures? Will you want to have any news media coverage?

Remember the Giving Circles Coordinator must review your promotional materials before you pay to have them printed. We must review all printed media materials, too. **To learn more about the guidelines for media involvement, please contact the Giving Circles Coordinator at 904.202.2250.**

Invite people early

If your event will have invitations, make sure the people you invite know the date as early as possible so they don't book something else. To send invitations, you'll need to develop a mailing list. Make sure that all your members work together on the list so you don't send duplicate invitations or miss someone because you think they're on another person's list.

All ticket prices should be noted on the event invitation. For tickets priced at \$75 or more per person, the IRS requires the charity to disclose what portion of the ticket price is not tax-deductible. For example, if a ticket price is \$100, and \$65 is not tax-deductible, please state: "Of the price you pay for admission, \$65 is not tax-deductible, as it represents the estimated value of the goods and services you receive."

New Giving Circles that are planning their first event should send invitations six weeks in advance. Established Giving Circles may send save-the-date notices up to six months before the event and invitations six weeks prior to the event.

Find sponsors

Sponsors provide financial support, merchandise, services or volunteer time to support a fundraising event. Sponsors can be individuals, families, businesses or organizations that either have a personal stake in the cause or who benefit from being associated with your event. Sponsorships are usually offered at tiered levels of financial commitment and donations of merchandise, service or time are usually converted into dollar amounts for sponsor recognition. Sponsors get recognition, awareness and thanks (all advertising) at varying levels corresponding to their financial commitment.

Keep a list of potential sponsors.

A potential sponsor is an individual or business that may benefit from exposure at your event. Ask Giving Circle members to make a list of businesses with which they have a personal relationship.

Have the Giving Circles Coordinator review and approve your list of potential sponsors.

The Foundation may already have an existing relationship with one of your potential sponsors and can help guide your solicitation based on our experience with that organization or individual. Please allow the Giving Circles Coordinator five business days for approval.

Customize your sponsor package

After your sponsor list has been approved by the Giving Circles Coordinator, create a personalized package that is customized to each potential sponsor. A sponsorship package should include a cover letter, proposal, sample of one of your marketing pieces, and explanation of the different levels of sponsorship and the benefits associated with each. Established Giving Circles may also want to add photographs from last year's event. To learn more about developing an effective sponsorship proposal and to see sample cover letters and proposals, visit www.WolfsonChildrens.org/GivingCircles. Please submit completed sponsorship packages to the Foundation office for review and approval and allow five business days for approval.

Develop promotional materials with a Wolfson Children's Hospital "look and feel."

Developing promotional materials can be easy when you know the general rules and guidelines. Below you will find some simple tips to follow when creating marketing materials for your event.

Give your event a brand

As you create your event, give it a name and a specific look and feel and then always use these consistently in all references to your event. A 5k run might be called "Making Strides for Children" and always uses orange and white colors. By creating a "brand" for your event, sponsors and participants have better recognition and recall. Consistency also minimizes confusion.

Affiliate your group with Wolfson Children's Hospital

A key part of your Giving Circle's appeal will be your link to Wolfson Children's Hospital. Giving Circles may use the Wolfson Children's Hospital name and logo in

your marketing material and flyers, your web site, in the media — anywhere you will be creating awareness for your event.

Use of our name and logo does have certain guidelines that you must follow, however, and all usage must be approved by the Giving Circles Coordinator.

Use of the Name of the Hospital

Wolfson Children’s Hospital should always be identified by its full name as “Wolfson Children’s Hospital” the first time you refer to it. The hospital may be called “Wolfson Children’s” in second or further references. Do not use shortcuts such as Wolfson, Wolfson’s or WCH. The Baptist Health Foundation name should not be used. All use of the hospital name must be approved by the Giving Circles Coordinator. Please send in your completed marketing materials to the Giving Circles Coordinator and allow five business days for formal approval.

Giving Circles “benefit” Wolfson Children’s Hospital

When referring to the hospital in your invitations, posters, press releases, etc., the proper way to show the relationship is that the event “benefits Wolfson Children’s Hospital.” Giving Circles are not in partnership nor does Wolfson Children’s Hospital sponsor Giving Circle events.

Examples of correct usage

“5K run benefitting Wolfson Children’s Hospital”

“Sweets for a Cause Bake Sale in benefit of Wolfson Children’s Hospital”

Examples of incorrect usage

“Wolfson Children’s Hospital presents a 5K run”

“Donate to Wolfson’s in our bake sale.”

“Benefitting Wolfson Children’s Hospital” has the additional benefit of being the right wording to signify that money raised will go to Wolfson Children’s Hospital, but it does not specify “all proceeds” or “profits” will be donated. You should always be

transparent and honest about your fundraising costs (which are expected not to exceed 35%) when asked, but there is no benefit in making this information explicit as part of advertising or outreach efforts.

Use of the Giving Circle Name

Should you use your Giving Circle name as part of your marketing? That answer is entirely up to you. If your Giving Circle name has some relevance to your cause or is otherwise known, go ahead. “Fleet Feet Running Club brings you a 5K run benefitting Wolfson Children’s Hospital” is great for those who know “Fleet Feet.” “The John Smith Memorial Softball Tournament benefitting Wolfson Children’s Hospital” gives a somewhat different feel. Do what works best for your group.

Have an event message

Your event should have a simple message that allows your audience to easily recognize what you are raising money for. A great example is “As the region’s only children’s hospital, Wolfson Children’s Hospital is where kids go when they are really sick. And Wolfson Children’s needs your help to help the children in our community.”

Tell the Wolfson Children’s Hospital story

Guest Speakers

If you would like to have a speaker from the hospital at your event, please let the Giving Circles Coordinator know at least six weeks prior. We can try to secure a physician, staff member or member(s) of a patient’s family on your behalf. We can also help by suggesting best practices for highlighting the speaker and working with a patient and his/her family.

A wonderful way to personalize your event is feature a patient’s experience at Wolfson Children’s Hospital and many Giving Circles are organized around a specific, individual experience. Giving Circles that feature specific patients are most successful when the Giving Circle’s members have a personal link to that patient. If your event features a patient, be sensitive to their needs. Did they have a positive experience at Wolfson Children’s Hospital? Are they comfortable talking about their experience?

Administration

- We can provide consent forms and advise on hospital protocol.
- We can serve as a liaison between your Giving Circle and Wolfson Children's, and help keep the patient's care team informed and up-to-date.
- We can review any printed materials about the patient's story and make sure that you have access to accurate medical statistics and information.

Telling the Patient Story

We can help you choose the best way to share the patient's story. For some events, it may be on stage before a live audience and for others it may be through the use of printed materials.

- For those Giving Circles that choose to feature the patient onstage, we can help you create a list of questions to ask that will be age appropriate and tell the patient's story best.
- We can advise you on the best way to acknowledge the patient and his/her family, both during and after the event. These might include: having a Giving Circle member serve as an "escort" or host during the event, giving the patient and his/her family complimentary tickets to your event, introducing the patient and family to the emcee before the interview, inviting the patient's physician, when appropriate, and accommodating dietary needs by providing special meals.

If your Giving Circle is organized around a patient and you would like to feature that patient at your event, please contact the Foundation at least four weeks prior to your event. Patient consent forms are required and are available from the Foundation.

Look for Publicity Opportunities

When promoting your event, it is crucial that you communicate with the Giving Circles Coordinator so that we can help you identify publicity opportunities and follow hospital guidelines. We can also provide press release templates and advise you on what to say in your promotional materials.

The Giving Circles Coordinator must review all publicity intended for the media, which includes newspapers, radio stations, television, and blogs. Remember media publicity is free so how your story is told is at the sole discretion of the newspaper, TV station, or radio station's editors. Your Giving Circle event is competing with thousands of other stories for a very limited amount of media coverage so start planning publicity early! The Giving Circles Coordinator needs one to two weeks to approve your materials. Those Giving Circles using the name and/or photo of a child patient for event publicity must receive written permission from the parents before you can send any information to the media.



Financial Procedures for Giving Circles

This section is an overview of the services that Baptist Foundation provides for your Giving Circle. Financial reports, taxes, and insurance are generally not the most fun part of fundraising but they are critically important. So we help you with these by giving you extensive support and making sure that everything gets done right.

The Foundation acts as the Giving Circle's "Bank"

The Foundation operates the checking account for each Giving Circle. In-house, we establish an "account" for each Giving Circle. All donations for the Giving Circle are credited to your account and all expenses are paid from your account. This service takes a large management, oversight and accounting burden from your Giving Circle. At the same time, donors are assured that their donations go directly to Wolfson Children's Hospital, and importantly, that their donations are tax deductible.

As your "bank," we can also accept donations made on your behalf using a credit card. We have several different ways to support credit card donations or purchases and we make sure that these are all credited to your account as part of the total funds you raise.

Start-up Funds

New Giving Circles that have not held an event should seek start-up funds from sponsors or obtain direct donations to cover start-up costs. Alternately, a Giving Circle may decide to fund start-up expenses directly and be reimbursed for these costs as donations are made. Reimbursements will be made only after a Giving Circle's account has a sufficient balance to cover the reimbursement. In no case will the Foundation or Wolfson Children's Hospital advance money to a Giving Circle or be responsible for Giving Circle expenses.



For Giving Circles that have run prior projects, a portion of project revenue can be retained (in your account at the Foundation) to meet start-up expenses for the next project. Start-up funds are generally used to cover expenses incurred during the planning phase of a project. A request to maintain start-up funds should be submitted within five working days after the completion of an event. Any start-up money left in an account without specific plans for future use will revert to Wolfson Children's Hospital after 18 months.

Expenses

Expenses will be submitted to the Foundation for payment to vendors or reimbursement to Giving Circle Members. So that Giving Circles maintain control of their expenses, expenses may only be submitted by members previously identified in this capacity with the Giving Circles Coordinator. The treasurer for the Giving Circle is a good candidate for this role. Expenses, invoices, etc. may not be sent directly by vendors.

All expenses should be submitted with the following supporting documentation:

- Reimbursement form
- Receipt or invoice
- W9 for the payee (unless one is already on record)
Contact the Giving Circles Coordinator to obtain these documentation forms.

Checks are cut and mailed on Monday and should be submitted 10 days prior for payment to be received by US mail the following week.

Any expense of \$2,000 or more requires prior approval by the Giving Circles Coordinator. To ensure sufficient time for staff review, please provide contracts or price quotes to the Foundation at least two weeks before the commitment is due.

Procedure for Credit Cards

Foundation staff can process all credit card payments for Giving Circle events and provide electronic credit card machines that store the credit card information and dollar amount until it is processed at the Foundation.

The machines are easy to use and eliminate manual errors such as incomplete or hard-to-read card numbers. The electronic machines come with step-by-step instructions. Staff may attend your event to assist with the credit card machines, depending on event size and type. The machines must be returned to the Foundation the next business day for reconciliation.

Manual credit card machines and credit card slips are also available. All credit card slips to be processed must be submitted to the Foundation the next business day after a Giving Circle's event. In addition to the credit card slips, Giving Circles must include the name of their Giving Circle, date of the event, and contact information for the Giving Circle's treasurer. Giving Circles will be responsible for following up with any donors whose credit cards are declined.

If you would like to have an electronic or manual credit card machine to use at your event, please notify the Giving Circles Coordinator at least two weeks prior to your event. Credit card revenue will be credited to your Giving Circle and counted in your fundraising total.

Taxes

When fundraising, sometimes you have to pay taxes and sometimes you don't. If you don't know the rules, it can feel a bit arbitrary. Here's a quick guide, but please talk to your Giving Circles Coordinator who can easily help you get it right.

Sales Tax Exemption

As an extension of Baptist Health Foundation, your Giving Circle will be exempt from sales tax on purchases you make. You can obtain a copy of a sales tax exemption letter by contacting the Foundation. All vendors must be shown the sales tax exempt letter at the time of purchase. Remember, only purchases that support your program qualify for sales tax exemption.

Sales Tax on Goods You Sell

Giving Circles that sell items such as t-shirts, hats, etc to raise funds for their event must include sales tax in the price of the item. If you're not sure whether or not you need to charge sales tax, please contact the Foundation, and we can help you figure it out.

If you plan to sell items, either at a single event or over a period of time, talk with the Giving Circles Coordinator to create a reporting plan that fits your needs, allows us to figure out what to charge, and to give the Foundation sufficient time to pay sales tax to the IRS. The Foundation will pay the sales tax to the IRS out of the revenue raised so please be sure to talk with us before you set prices.

Event Insurance

Baptist Health Foundation carries an umbrella insurance policy for Giving Circle events. When planning your venue, remember to ask for a checklist of requirements from the host facility or organization. If you need a certificate of insurance, please contact the Foundation, and we will be happy to provide you with one.

Contracted Services

Giving Circles may sign contracts with vendors. Once a contract is signed, it is the responsibility of the Giving Circle to abide by the agreement, just as the vendor is responsible for its commitment. The Foundation cannot make loans to Giving Circles to pay deposits or cover a loss should a Giving Circle be unable to satisfy the requirements of the contract. Giving Circles should have a well-thought-out plan and timeline in place as to how funds will be generated to meet contractual commitments.

If your Giving Circle hires a service provider, such as a caterer, printer, performer, auctioneer, graphic artist or other professional, whose fee is \$600 or more, a Form 1099 must be filed with the IRS. All 1099 Forms will be filed by Baptist Health Foundation. To get a copy of the 1099 Form, contact the Foundation. 1099 Forms must be submitted to the Foundation before the service provider can be paid. To facilitate the filing of this form, your Giving Circle must complete a W-9 form for the contracted person or company prior to payment for any services.

Because Giving Circles are nonprofit organizations raising funds for Wolfson Children's Hospital, you may be able to negotiate reduced deposits and payment time frames. If at any time during event planning your Giving Circle has difficulty meeting its contractual obligations, please inform the Foundation so that appropriate guidance can be provided.



Day of Event Logistics

Sometimes a really good check list can make your big day go better. Here are a few items to consider including on your check list:

- Have volunteers arrive at least a half hour early for a brief orientation the day of the event so that they'll all know what to do.
- How many volunteers will you need the day of the event?
- How will volunteers be identified? At some events, it's helpful to have a quick and easy way for guests to identify the volunteers such as coordinated nametags or matching colored shirts.
- Do you need to feed your volunteers? Will your volunteers need breaks? If you schedule a volunteer to work more than one hour at a time, he or she may need to take a fifteen minute break. Be sure to schedule a replacement volunteer.
- Book extra time at your venue for set-up and clean-up before and after your event.
- Have you thought about how people will flow through the layout of your event?
- Develop a rain plan if your event is held outdoors.
- If cash will be on hand at your event, hire an off-duty Jacksonville Sheriff's Office for security.
- Does your venue require security? Do they charge a separate fee for security?
- Reserve a designated parking area for your event.
- Obtain an event permit, if required.
- Request logos from corporate sponsors for printing.
- Designate one person to be in charge of transporting all presentation items such as gifts, plaques, trophies to the event site.
- Prepare an event box with any supplies, such as tape, string, zip ties, staplers, clip boards, pens, baskets, etc. you may need the day of the event.
- Bring a schedule of events, instructions, directions, phone numbers, banquet orders, seating charts, name tags, table assignments, guest lists, and the event supply box with you on the day of the event.
- Have a Giving Circle member serve as a "host" for the event speaker.
- Make sure venues have suitable restroom facilities for your guests.
- Do you need directional signage? How will you display the signs? Do you need easels? Will the venue supply the easels?
- Do you want to skirt your sign-in table? How many will need to man the table? How do you want to arrange the names of the people who are registered for the event?

Event Supplies

The Foundation can supply Giving Circles with some supplies for events. We have items such as cash boxes, banners, balloons, and credit cards machines which are available on a first come, first serve basis. Our list of event supplies is continually changing, so if you do not

see an item on the list, contact the Foundation office and ask. Please contact the Foundation offices at least two weeks prior to your event to request supplies.

Giving Circle Templates and Training

Along with this guide, we have a variety of templates and printed resources that you can use to help plan and organize your event. Below you will find a comprehensive list of all available materials, which can be downloaded at www.WolfsonChildrens.org/GivingCircles. In addition, approved Giving Circles can get a copy of a tax exempt certificate for all Giving Circle expenses by calling the Giving Circles Coordinator.

- Sponsorship cover letter
- Sponsorship Procurement Form
- Sample sponsorship levels
- Sample project timeline
- Event timeline
- Sample budget
- Pre-Event Form
- Post-Event Form

Wrapping Up Your Project

The big day is over, and you can finally put your feet up. Rest for a few days, but you've still got a few last tasks that will both wrap up this year and make next year's event even better.

Act quickly

Memories fade fast, so start wrapping up all the details right away! You should complete any post-event details within two weeks of your event.

Just as you divided the tasks among the group before the event, so should you divide the tasks after the event. It will go much faster if you assign post-event

responsibilities before the event takes place so that Giving Circle members will know what they are supposed to do.

Give thanks and recognize your donors, sponsors, and guests

Post-event Recognition

Baptist Health Foundation will fulfill all IRS requirements for acknowledgement and will send receipts or thank you letters to all donors. However,



Giving Circles should consider acknowledging and thanking donors directly.

Post-event donor recognition is just as important as making sure that everything goes smoothly on event day. Provide unique, personal recognition to your top supporters. Who, in addition to your hardworking Giving Circle members, contributed the most to your success and deserves extra attention? Corporate sponsors? Generous individuals? In-kind donors?

Some of the many ways to express your appreciation include:

- A handwritten note signed by your Giving Circle members



- A personalized photograph to commemorate the event
- A “Save the Date” card for next year’s event with a message of your appreciation

Debrief

Feedback and discussion after an event are a great way to capture what you learned and what you would change. Consider hosting a committee meeting after the event to debrief.

Get feedback from your guests

Think about calling or mailing a brief survey to your guests to ask them what they thought of the event. Some topics you might want to ask about include food and beverages, speakers, entertainment, venue, registration, and the quality and selection of auction items. It’s best to call your special guests and top donors to get their personal feedback and to thank them for their support.



Meet with your executive team

You should also solicit feedback from your core group and sub-committee chairs. Ask for their candid feedback and make sure you provide an environment in which they feel welcomed to be open and honest.

Evaluate feedback and make recommendations for next year’s event

Write down all ideas discussed for improvement and focus on the top priorities for next year’s event.

Fill-out a post-event form

Complete a post-event form so that we know about your success and how we can help you with next year’s event.

Celebrate your success.

After evaluating the event’s success, take a moment to celebrate all of your hard work! You, and everyone who helped, deserve a chance to relax and celebrate your success! Now, you can finally rest, before you start planning for next year.

Canceling a Giving Circle Event or Disbanding a Giving Circle

Baptist Health Foundation may at its sole discretion cancel a planned Giving Circle event, disband a Giving Circle or take any action determined to be in the best interest of Wolfson Children’s Hospital. Staff may, but shall not be required to, consider the following in any such determination:

- Misrepresentation of Wolfson Children’s Hospital, Giving Circles program, or the event.
- Misappropriation or misuse of Giving Circles or the Giving Circles’ funds or resources.
- Misuse of Giving Circle’s records.
- Giving Circle’s activities are not aligned with the values and mission of Wolfson Children’s Hospital.
- Project or event expenses exceed 35% of gross revenue. (Giving Circles net proceeds to expense ratio standard is 65% net revenue to 35% expenses.)
- Non-compliance with Giving Circles’ policies and guidelines as outlined in this Leadership Manual.
- Conflict of interest with Wolfson Children’s Hospital or Baptist Health Foundation.
- Giving Circle has no volunteers.

Conflict of Interest

Wolfson Children's Hospital and Baptist Health Foundation are committed to the highest standards of ethical conduct in every aspect of our activities. When you represent your Giving Circle, please remember you are also representing Wolfson Children's Hospital. Giving Circle members may not use their Giving Circle activities for personal gain or profit. Giving Circles and

Baptist Health Foundation work by the values outlined earlier: transparency, honesty, integrity, and respect. We trust that our volunteers will use the same principles in their charitable work on our behalf. If you ever feel you are in a situation where there is a conflict of interest, please contact the Foundation to discuss the best way to proceed.



Thank You

Thank you for giving your time, talents, and resources to Wolfson Children's Hospital. Together, we are helping to give the children in our region a chance at fuller, happier, and healthier lives.

Appendix A: Wolfson Children's Hospital Giving Circles Event Timeline

The following timeline offers suggestions on key tasks and when they need to be accomplished around your event. Your event may not need these specific steps, but this guideline should help spark ideas for you to create a timeline of your own. Immediately following this checklist is a sample timeline format that you can use for your event.

TEN TO TWELVE WEEKS IN ADVANCE

- Determine the purpose, format, and feasibility of the event
- Create an estimated budget and get approval from the Giving Circles Coordinator
- Select the date. It's always a good idea to clear the date with important participants first.
- Draw up preliminary guest list categories. Determine the audience you want to target and plan your event accordingly.
- Select the theme
- Select and reserve a facility
- Develop a rain plan if the event is to be held outdoors
- Choose a caterer
- Select and order recognition items (award, honor, citation)
- Create sponsorship amounts/levels
- List items to be underwritten and possible sources
- Order favors, souvenirs, printed folders, and other give-away items
- Reserve rental equipment such as vans, buses, tables, chairs, tents, podiums, etc.
- Contact the Giving Circles Coordinator to help coordinate a master of ceremonies and the program speakers. Staff can help provide patient and family information.
- Plan audio-visual presentations
- Begin monthly committee meetings

EIGHT TO TEN WEEKS IN ADVANCE

- Write copy, design, and get approval of printed invitations and all other printed materials

- Fill out a pre-event form 60 days prior to your event so that the Giving Circles Coordinator may share your story in our publications
- Write/send potential sponsorship list to the Giving Circles Coordinator for approval. Staff will help coordinate your requests for funds to the appropriate sponsors
- Request logos from corporate sponsors for printing
- Prepare mailing labels
- Send save-the-date announcements to guests (3-5 months prior to the event)
- Select menus and submit them for approval
- Contact the Giving Circles Coordinator to help coordinate with program participants
- Decide on music, book entertainers and talent
- Prepare and get all necessary signatures on performance agreements
- Finalize the audiovisual presentations
- Plan the decorations and color scheme
- Order props, novelties, food, or other special needs
- Choose and meet with the florist
- Begin creating a logistical outline to document all arrangements as they are decided on and confirmed

SIX TO EIGHT WEEKS IN ADVANCE

- Contact the Giving Circles Coordinator to help identify publicity opportunities
- Prepare mailing labels for invitation mailing
- Send out invitations 4-6 weeks prior to event
- Finalize décor and facility arrangements
- Mail an itinerary to dignitaries

- Make direction and welcome signs
- Write, print, and submit the program and menu cards for approval
- Continue publicity on schedule
- Recruit volunteers to staff registration or assist as escorts and greeters, etc.

TWO TO FOUR WEEKS IN ADVANCE

- Record and acknowledge RSVPs as they are received
- Write to VIPs and program participants to confirm participation
- Finalize details with caterer, rental company, and all vendors
- Write speeches and introductions, and get them approved
- Take delivery on favors, mementos, novelty items, and double-check for correct amount
- Enlarge a diagram of the room to be used as a seating chart
- Continue assigning seats; set head table, speaker's platform
- Create a production schedule outlining all deliveries, cues, and timing for the event
- Review script/timeline
- Confirm setup and tear down times with event site
- Phone follow-up for sponsors
- Meet with chairpersons to finalize any of the above
- Begin weekly meetings

ONE WEEK IN ADVANCE

- Ascertain the intentions of anyone who has not sent an RSVP
- Print out the guest list in alphabetical order
- Finish place cards, table cards, and/or name tags
- Create the seating chart
- Brief the greeters, escorts, and volunteers on their duties. Hold training session to finalize assignments

- Schedule volunteer assignments for day of event
- Gather all presentation items such as gifts, plaques, trophies. Collect ceremonial items. Designate one person to be in charge of transporting them to the event site.
- Plan an arrival briefing for VIPs if necessary
- Deliver prepared introductions, citations, and speeches to those who will read them
- Finalize catering guarantees
- Prepare your event box with any supplies, such as tape, string, zip ties, staplers, clip boards, baskets, etc. you may need

THE BIG DAY

- Arrive early
- Bring the logistical outline, production schedule, instructions, directions, phone numbers, banquet orders, seating charts, name tags, table assignments, guest lists, and the event supply box with you
- Check all facilities and grounds
- Set up event venue with tables, chairs, place cards, signs, favors, awards, etc.
- Conduct sound and equipment checks
- Set up registration. Be sure it is ready no later than 30 minutes prior to the start of your event
- Follow your production schedule
- Relax and smile

AFTER THE EVENT

- Send thank you notes to volunteers, vendors, and staff
- Finalize billing and prepare final budget
- Submit a post-event form to the Giving Circles Coordinator within 30 days of your event
- Conduct event debriefing to determine success or ways to improve in the future.
- Survey attendees, if appropriate

Sample Project Timeline

This sample timeline is offered only as an example and is not meant to be a complete guide.

Date	Tasks	Responsible
Jan 3	Convene first Giving Circle planning meeting <ul style="list-style-type: none"> • assign roles, sub-committee leadership • develop rough budget • agree who the target audience is for the run • agree on target dates 	All
Jan 5	Contact local running organization to clarify date availability and conflict with other runs, arrange for use of their timers, finish line set-up, etc. Set a date if possible. Negotiate rates. Identify course area and requirements to hold a run there.	Logistics committee
Jan 15	Send budget for review to Giving Circle members	Treasurer
Jan 20	Develop list of potential sponsors and assign responsibility to approach each	Sponsorship Committee
Jan 30	Complete drafts of messaging, flyers, outreach plan Get approval from the Giving Circles Coordinator on messaging, logo use	Marketing committee
Feb 5	Giving Circle planning meeting <ul style="list-style-type: none"> • Review budget • Marketing • dates and project timeline • identify possible celebrity runners who might come to the event • sponsorship update 	All
Feb 15	Finalize negotiations with running organization, provide down payment, update budget Finalize course arrangements with park where run will be held	Logistics committee
Feb 20	Have sponsorship requests made to all potential sponsors on the list	Sponsorship Committee
Feb 25	Get flyers out to target audience	Marketing Committee
Mar 15	Ask [a celebrity runner] to come to the event to greet the winners and acknowledge the youth runners	Speaker Committee
Mar 20	Follow up with sponsors on list	Sponsorship Committee
Mar 25	Meet with high school track team to secure their participation	Outreach Committee
Apr 3	Meet with Fleet Feet Running Club to secure their participation	Outreach Committee
Apr 5	Giving Circle meeting	All
Apr 20	Follow up with sponsors on list	Sponsorship Committee
May 1	Giving Circle meeting	All
May 5	Print t-shirts for runners	Marketing Committee
May 5	Reconfirm all agreements and expectations with park and running organization	Logistics Committee
May 10	EVENT DAY! 5k Run held at the park	All
May 20	Thank all sponsors	Sponsorship Committee
May 20	Thank all partners	Logistics Committee
May 30	Giving Circle meeting and celebration	All

Appendix B: Detailed Event & Budget Planning Guide

Fundraising events are like life. Everything costs a little bit more than you expect. If you are new at event planning you might be surprised at how many items get added to the budget. This extensive list can help you identify various costs and build a realistic budget.

Location, Location, Location

Site rental is a big expense item.

Make sure you include all expenses including tips for the help.

Rental Fee _____

Permit(s)/License _____

Labor _____

Subtotal \$ _____

Rentals

Make sure costs include delivery, set up, and tear down. Make sure items can be delivered when you need them.

Heat/Air _____

Furniture _____

Tables _____

Registration Tables _____

Chairs _____

Pipe & Drape _____

Carpeting/Flooring _____

Props _____

Tents/Canopies _____

Staging (skirting, stairs) _____

Risers _____

Stanchions/Ropes _____

Labor _____

Subtotal \$ _____

Feeding Your Guests

Work closely with your caterer. You want great food. You want enough food. You don't want to waste food. Ask about each item below to make sure there are no surprises when you get the bill.

Food _____

Beverages _____

Bartender fees _____

Catering fees _____

Equipment _____

Tables/Chairs _____

Supplies-Linens, China, _____

Glasses, Utensils _____

Labor/Staff _____

Gratuities _____

Tax _____

Health Permits _____

Personnel/VIP/Guests/ _____

Volunteers _____

Misc. Charges _____

Subtotal \$ _____

Audio-Visual

Is everything compatible? Do you need Internet access? We try to have copies of all presentations preloaded.

Television Monitors _____

Video Players/Recorders _____

Cameras _____

Overhead Projectors _____

Projectors/Carts _____

Slide & Film _____

Screens _____

Lecterns/Podiums _____

Microphones _____

Reel-to-reel Tape Recorders _____

Disc Players _____

Sound System _____

Walkie-Talkies _____

Pointers/Marking Pens _____

Flip Charts _____

Blackboards _____

Computer Interfaces _____

Technical Staff _____

Labor _____

Subtotal \$ _____

Keeping the Lights On

General Lighting _____

Special Lighting _____

Generator _____

Extension Cords _____

Video Production _____

Other Rentals _____

Labor _____

Subtotal \$ _____

Decorations and Party Supplies

Event Decor _____
Stage Decor _____
Stage Backdrop _____
Centerpieces/Table Decor _____
Flowers/Plants _____
Candles _____
Balloons _____
Specialty Linen _____
Chair Covers _____
Signs _____
Props _____
Paper Supplies _____
Misc. Charges _____
Labor _____
Subtotal \$ _____

Entertaining Your Guests

Music _____
Talent _____
Celebrity _____
Speaker's Fees _____
Models _____
Labor _____
Other _____
Subtotal \$ _____

Taking Out the Trash

Water Hookup _____
Restrooms/Portapotties _____
Trash/Dumpsters/ _____
Receptacles _____

Disposal Service _____
Setup Crew _____
Cleanup Crew _____
Supplies _____
Misc. _____
Subtotal \$ _____

Promoting the Event

Newspapers _____
Magazines _____
Radio _____
TV _____
Show Signs _____
Street Signs _____
Directional Signs _____
Banners _____
Printed Photos _____
Promotional Items _____
Radio/TV/Video Production _____
Subtotal \$ _____

Security

Facility _____
Private _____
Subtotal \$ _____

Insurance

Gen. Liability Insurance _____
Rider _____
Specialized _____
Subtotal \$ _____

Collateral Materials

Designer _____
Business Cards _____
Brochures _____
Media Kit _____
Registration Packets _____
Posters _____
Flyers _____
Invitations _____
Tickets _____
Letterhead/Envelopes _____
Specialty Items _____
Duplicating/Photocopies _____
Logo _____
Program _____
Subtotal \$ _____

Misc. Printing/Specialties

Menus _____
Maps _____
Sponsor Signs _____
Special Area _____
VIP Area _____
Name Tags/holders _____
Place Cards _____
Awards, Recognitions _____
Engraving _____
Certificates _____
Prizes _____
Frames _____
Thank You Cards _____
Other _____
Subtotal \$ _____

Transportation/Parking

Limousine/Car Rental _____
Valet Area _____
Shuttle _____
Mileage Reimbursement _____
Labor/Personnel _____
Subtotal \$ _____

On-Site Transportation

Truck/Van Rental _____
Carts/Hand Trucks _____
Special Vehicles _____
Other _____
Labor _____
Subtotal \$ _____

Travel/Accommodations

VIP Travel _____
Limousine/Car Rental _____
Hotel _____
Staff Travel _____
Limousine/Car Rental _____
Hotel _____
Subtotal \$ _____

Personnel

Event Manager _____
Show/Event Staff _____
Additional Staff _____
Overtime _____
Host/Hostesses _____
Registration _____
Consultants _____
Public Relations _____
Other _____
Subtotal \$ _____

Emergency Considerations

Medical _____
Ambulance _____
Rain Plan Cost _____
Canopies/Tents/Coverings _____
Subtotal \$ _____

Postage/Shipping/Storage

Postage _____
Bulk Mail/Permits _____
Mail House _____
Freight _____
Delivery Service _____
Drayage _____
Subtotal \$ _____

Misc. Costs

Accounting _____
Legal Counsel _____
Office Supplies _____
Office Equipment _____
Phone _____
Ticket Sales Fees _____
Warehouse _____
Mileage _____
Parking _____
Extra Supplies _____
Event Photographer _____
Event Videographer _____
Coat Check
Volunteer
(Appreciation Activity/Gifts) _____
Complimentary Tickets _____
Local, state, federal taxes _____
Misc. Gratuities _____
Specialized Labor _____
Other _____
Subtotal \$ _____

Appendix C: Procurement Cover Letter Sample

Dear _____,

I am a volunteer with the Wolfson Children's Hospital Giving Circles Program, and am writing to you to ask for your support of **Event Name**, a very special event to **describe event's goal**. The **Event Name** will be held on **date**, and at **venue name**. **Brief description of the event**.

As a not-for-profit, Wolfson Children's ability to deliver services to the children of our community is directly impacted by its available resources. At Wolfson Children's Hospital, all children are provided with the highest level of pediatric care, regardless of their families' ability to pay.

We hope you will join us in support of the **Event Name** this year through a donation of **donation name/item**. This would be a wonderful addition to the event and would certainly enhance the impact made through the dollars that are raised.

In return for your donation, we would like to offer **Company Name** the following promotional consideration:

- **Company Name** and/or Logo on event sponsor board
- **Company Name** and/or Logo on all event materials including media communication
- Tickets to the event

If you are interested in participating, please complete the enclosed procurement form and return it either by fax at 904.202.2875 or by e-mail at GivingCircles@bmcjax.org.

Please feel free to contact me at **phone** or at **e-mail address** if I can be of assistance.

Thank you so much for considering supporting **Event Name**, to benefit Wolfson Children's Hospital, the region's only hospital dedicated solely to serving children. We, and more importantly, the children really appreciate it.

Sincerely,

Your Name

Appendix D: Wolfson Children's Hospital Giving Circles Post Event Evaluation

While a post-event evaluation isn't required, these questions will help your Giving Circle assess how well you did and what changes you will make for future events.

1. Did we meet our goals/objectives with this event?
2. Did we meet our budgetary goals?
3. Did we have enough volunteers for this event?
4. What could we have done differently to make the event better/more productive?
5. Did we have enough advertising/PR for the event? How could we have made this better?
6. Did we execute the program in a professional manner?
7. Did we face any group conflict with this program? What was it? How was it resolved? What could we have done differently?
8. Would we utilize the same vendors/performers again?
9. Would we execute a similar program in the future? What changes would we make?
10. How does this program allow us to grow as a group, officers, and leaders?

Appendix E: Required Approval List

The following list gives you a handy checklist for those items which require approval by the Giving Circles Coordinator.

Item	Lead Time
Approval of Giving Circle and Event	Minimum of 90 days before you'd like to hold your event. Earlier is better. Events which require more planning time will require an earlier approval time.
Sponsor list and sponsor packet	5 business days
Any item using Wolfson Children's Hospital name or logo (invitations, flyers, posters, emails, web sites, etc.)	5 business days
Any media releases	6 weeks
Request to keep start up funds for next year's event	No more than 5 days after an event
Expenses	10 business days
Vendor contracts over \$2,000	10 business days