

How to Hold an Event

Welcome and thank you for your interest in planning a special event to benefit Piedmont Healthcare. No matter the size of your event, your decision to help will have a positive impact. To help ensure the success of your event, Piedmont has established the following guidelines for fundraising and promoting your event or project. Fundraising events require prior approval from Piedmont.

Thank you again. We are grateful for your commitment to Piedmont Healthcare and wish you every success with your fundraising activity.

This Special Events Information Packet with Tools provides helpful information to make your event a great success.

If you have any questions or need additional information, please call the Piedmont Healthcare Office of Philanthropy at 404/605-2130

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PIEDMONT HEALTHCARE FOUNDATION

Special Event Policies and Guidelines

Introduction

Thank you for considering holding a fundraising event to benefit Piedmont Healthcare. We appreciate your desire to share your time and energy to help make a difference in the life of a patient. No matter the size of the event your decision to help will have a positive impact on Piedmont's hospitals.

Special events, no matter the size or scope require good planning and time. These policies have been developed to enable you and Piedmont to be good stewards of your and your volunteers' time and increase the likelihood of a financially successful event. Events held to benefit Piedmont fall into three categories:

Private event: A Piedmont-approved event planned and organized by an individual to be conducted in a private home or among a small group of friends. The Foundation requests that such events yield at least \$2,500 to benefit Piedmont.

Promotional event/Cause related marketing: A Piedmont-approved event conducted completely by community leadership or business requiring little or no staff involvement and no budget for the purpose of raising money. The role of the Foundation staff in a promotional event is typically approving the event, approving the use of a logo and any copy involving the Piedmont name, banner placement, and receiving the proceeds. The Foundation requests that such events yield at least \$5,000 to benefit Piedmont.

Ready-Made Event:: A Piedmont-approved event conducted completely by community leadership requiring little or no staff involvement or budget for the purpose of raising money. The role of the Foundation staff in a turnkey event is typically approving the event, approving the use of a logo and any copy involving the Piedmont name, banner placement at the event, and receiving the proceeds. The Foundation requests that such event yield at least \$10,000 to benefit Piedmont.

Foundation-sponsored event: An event that has been created as part of the Foundation's overall philanthropic strategy and is approved, directed and controlled by the Foundation. These events are part of the Foundation budget and Foundation staff time is allocated to these events.

Policies and Guidelines

Based on best practice ideas, the following policies and guidelines have been prepared by the Piedmont Healthcare Foundation to assist event organizers in the planning, fundraising and promotion of an event or project. A fundraising event or project hosted by the community (an individual or group) to benefit Piedmont Healthcare should keep in mind the Piedmont Mission, Vision and Promise (please see attached).

1. Community events and projects that benefit any aspect of Piedmont Healthcare must be approved and sanctioned by the Foundation office and must be approved every year thereafter to repeat an event in a succeeding year. Please complete and submit the Special Event Application ([hyperlink](#)) at least 45 days in advance of the event in order to begin the approval process.
2. All events must comply with all federal, state and local laws and Piedmont policies governing charitable fundraising, gift reporting and special events. (Attached is a summary of those policies that may apply.) In accordance with best practices, the Foundation recommends that all tickets, invitations or entry forms state which portion of the contribution is tax-deductible. (If a donor receives a product or service in exchange for his or her donation, the fair market value of that product or service must be subtracted from the contribution amount regardless if that product or service is donated. The remaining amount may be tax-deductible.)
3. Special events and projects must be financially self-sustaining without contribution from or financial risk to Piedmont.
4. Event planners may not keep any portion of the proceeds as profit or compensation for organizing the event. Expenses for the event may be charged against event proceeds, however, if event expenses are greater than the money raised, the event planner is responsible for paying those expenses.
5. All corporate sponsors' requests must be pre-approved by Piedmont to ensure there are no conflicts with other key event sponsors or donors currently supporting the system in other areas. Please notify the Philanthropy office if the host plans to contact businesses, individuals or organizations for sponsorship or underwriting proposals. Please remember that many individuals and businesses already support Piedmont and may not wish to make additional donations.
6. Piedmont encourages hosts of each event to share the list of attendees or participants with Piedmont so that the Foundation can thank donors for their participation.
7. In the context of contributions made by a Vendor to attend a fundraising event (whether such fundraising event is sponsored by PHC or a third-party), such as the purchase of a table at a fundraising dinner or a foursome slot at a fundraising golf tournament, the Vendor may not invite as its guests healthcare professionals who have any relationship or affiliation with PHC. Please see Policy 5045 for additional information on compliance assurance with vendors, physicians and leadership.
8. For gift recognition records, the host should send the donation(s) to the Foundation within 30 days of the completion of the fundraising event or project. If the event takes place during the fourth quarter and the donor wishes to be recognized within the calendar year, Piedmont must receive the donation by December 31 of that year.

9. As stated in Piedmont Healthcare Foundation's gift-naming policies and guidelines, there will be consistent Foundation and institutional administrative approval/oversight of gift arrangements before commitments are made to the donor. The primary criteria for acceptance of gifts of tangible personal property are the usefulness of the property to the Foundation, to Piedmont Healthcare or to one of its entities and the property's marketability. If a host is raising money for supplies and equipment, best practices dictate that the funds be given to Piedmont, which will in turn purchase the items.
10. If circumstances warrant, Piedmont may opt out as a beneficiary of the event/promotion at any time with no obligation.
11. In accordance with Georgia law, an event organizer may not conduct a raffle drawing as a part of an event without obtaining a raffle license. To obtain this license, the organizer will need to contact the sheriff's office located in the county where the raffle is held.
12. Special events and projects must comply with the following:
 - Companies with public images that would have the potential to compromise the goodwill of Piedmont or conflict with Piedmont's mission or values may not be major or presenting sponsors and may not promote their products through advertising or other event exposure. This may include alcohol, tobacco or firearms companies with similar products that do not support the health and well-being of our community. Sales-driven fundraising projects or projects that directly imply endorsement/ promotion of a single product or service are not supported by Piedmont. As a healthcare provider, Piedmont Healthcare does not sell or endorse products or services provided by other organizations.
 - All community fundraising projects that require promotional visibility (e.g., invitations, advertisements, press releases, fliers and brochures) must have approval by Piedmont before using the Piedmont Healthcare or other Piedmont entity name and/or logo.
 - An estimate of the projected expenses and donation amount should be provided to Piedmont prior to hosting the event or project. At least 50% of the net proceeds must be donated to Piedmont in order for the Piedmont name to be used in promotion.¹ Piedmont will consider exceptions to this policy if the event warrants, depending on the proposed other charity and the proposed allocation of the donated proceeds.

¹The Council of Better Business Bureau states that, "reasonable use of funds requires that at least 50% of total income from all sources be spent on programs and activities directly related to the organization's purposes." The Foundation will not approve an event in which fund-raising costs exceed 50 % of total income. The Piedmont Healthcare Foundation strives to maintain fund-raising costs at 15 to 25 % of the total income and strongly urges event organizers to meet this standard.

- The public should be informed regarding any net amounts that will be donated to Piedmont Healthcare. If Piedmont will not receive all of the proceeds from the event, then the exact percentage of the proceeds that benefit Piedmont must be stated clearly on all invitation copy, advertising and promotional materials.

To support your event, Piedmont cannot:

- Release donor, volunteer, employee, physician or other mailing lists for the purpose of additional solicitation of funds by outside groups
- Offer funding or reimbursement for expenses
- Guarantee promotion of an event through Piedmont's publications and media outlets
- Be responsible for selling tickets for events
- Be responsible for providing staff or volunteer support leading up to the event
- Guarantee staff or volunteer participation at the event, or patient family attendance
- Provide facilities to hold the event
- Extend our tax exemption
- Provide Piedmont hospitals letterhead, place event fliers, posters or other promotional material throughout each hospital
- Provide individual receipts to those who support the event
- Serve as a registration source for events such as on-line registration or RSVP's.

Please call the Philanthropy Office at least eight weeks prior to an event to discuss staff representation. Thank you again for your support of Piedmont Healthcare. For questions or additional information, please contact Piedmont Philanthropy at 404-605-2130.



Special Event Application

Your Information:

Contact Name: _____

Are you a (an):

- Individual
- Community Group
- Business
- Foundation
- Other _____

Name of organization (if applicable): _____

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Event Information:

Name of the proposed event: _____

Type of event: _____

Event date: _____ Event start time: _____

Event location: _____

Briefly describe the event: _____

The event is:

- open to the public
- invitation only

Does the event require a license?

- Yes
- No

Will the event include an auction or raffle?

- Yes
- No

How will the event be publicized? _____

Projected attendance: _____

Estimated net income: _____ Estimated event expenses: _____

Are there any beneficiaries besides Piedmont Healthcare? If yes, please list (at least 50% of the net proceeds must be donated to Piedmont in order for Piedmont's name to be used in promotion): _____

Will the money from the event be used to support a specific area of the hospital? If yes, which? _____

Will local businesses be contacted for donation, sponsorship or to assist in any way?
 Yes No

If yes, please identify the businesses you wish to contact (use a separate sheet if necessary). You must have permission from Piedmont Healthcare prior to soliciting any business.

Will the event require insurance?
 Yes No

If yes, will you provide the insurance? (Piedmont will need a copy of the insurance):
 Yes No

Is this going to be an annual event?
 Yes No

If yes, do you plan for Piedmont to be the beneficiary in future years? If so, please plan to submit an application each year.
 Yes No

(Your name or name of your organization) guarantees that a minimum of \$ _____ will be donated to Piedmont Healthcare. The donation will be received by Piedmont before (date) _____.

I have read, understand and agree to abide by the Piedmont Healthcare Special Event Guidelines. I understand the information I provide in this in this application is kept on file. This application must be submitted no less than 45 days prior to the proposed event date.	
_____ Signature	_____ Date

Return this entire application to:
Piedmont Healthcare, Incorporated
Office of Philanthropy
ATTN: Special Events
1968 Peachtree Road, NW
Atlanta, GA 30309
FAX: 404/609-6758
Email: philanthropy@piedmont.org

Planning Your Event

1. Review the event policies and guidelines: We appreciate your desire to support Piedmont Healthcare and want your event to be a success! Based on best practice ideas, we have prepared event guidelines to assist you in the planning, fundraising and promotion of their event. Your adherence to our Special Events Policy (see page 2) is required and we encourage you to use them as a guide during your planning process.

2. Register your event: After reviewing the event policies and guidelines, please complete the Special Event application (see page 6) send it by fax, mail or email. A member of the Piedmont Philanthropy Team will contact you upon receipt of the application to discuss your event and the approval process. **Applications must be submitted no less than 45 days prior to the proposed event date.**

Piedmont Healthcare, Incorporated
Office of Philanthropy
ATTN: Special Events
1968 Peachtree Road, NW
Atlanta, GA 30309
FAX: 404/609-6758
Email: philanthropy@piedmont.org

3. Form a planning committee: Gather enthusiastic family, friends and colleagues to start planning. They can provide the support you will need to organize and plan your event. Recruit enough committee members with a variety of skills to share the workload and maximize effective results.

4. Prepare a budget: Establish a fundraising goal and identify potential sources of income and expenses. Try to secure in-kind donations from local businesses to keep your costs down. Remember that the lower your costs, the larger an impact your event can have. Please refer to our sample budget sheet (see page 11) to get you started.

5. Spread the word: Give yourself plenty of time for invitations and publicity. Send invitations and emails to everyone you know and ask them to help by telling their circle of friends. Publicity and promotion are often the keys to a successful event.

6. Raise money: Solicit pledges from individuals and matching gifts from employers (be sure to track all of these donations!) – consider keeping the donors and volunteers names and addresses on file for future use. This will make acknowledgements a breeze when the event is over.

7. Have fun! Hold your event – have a great time raising money and awareness for Piedmont Healthcare’s mission, vision and promise.

8. Collect funds: We ask that all net proceeds be forwarded to us within thirty (30) days of the event. All checks must be payable to Piedmont Healthcare. If the event takes place during the fourth quarter and the donor wishes to be recognized within the calendar year, Piedmont must receive the donation by December 31st of that year.

9. Say thank you: Don't forget to acknowledge and thank your committee, donors, participants and sponsors as soon as possible after the event.

Frequently Asked Questions

1. How will I know if my fundraiser has been approved?

You will be notified by someone from the Philanthropy Office within ten (10) business days. We cannot endorse fundraisers that do not support the Piedmont Mission, Vision and Promise and reserve the right to review and request additional information before acting on a proposal.

2. Can I use Piedmont's name and/or logo?

Yes. Prior to use, please be sure to submit for approval all promotional materials on which you would like the Piedmont name and/or logo to appear. At least 50% of the net proceeds must be donated to Piedmont in order for the Piedmont name to be used in promotion.

3. Can I solicit corporate sponsorship for my event?

Yes. However, Piedmont must pre-approve all corporate sponsorship requests to ensure that there are no conflicts with other key event sponsors or donors supporting the system in other areas. Please remember that many businesses already support Piedmont and may not wish to make additional donations – we can help you with those determinations. Additionally, be aware that in order for a sponsor's contribution to be tax deductible, their check must be written to Piedmont Healthcare and not to the expenses of the event. The donation will be credited back to the event total.

4. Will Piedmont help with the expenses for my event?

No. Special events and projects must be financially self-sustaining without contribution from or financial risk to Piedmont.

5. Can I hold a raffle at my event?

Yes. Raffles and auctions are a great way to raise money. Georgia has strict regulations governing raffles and gaming events carried out for charitable purposes. An event organizer may not conduct a raffle drawing as part of an event without obtaining a raffle license. To obtain the license, the organizer will need to contact the sheriff's office located in the county where the raffle is held.

6. Who will help run my event?

The Piedmont Philanthropy staff may be able to provide some guidance, however, due to time and staff constraints; we are unable to manage your event for you. We recommend that you form a committee of friends, family and others who are excited about your cause.

7. Who should donors make checks payable to?

Checks can be made payable to Piedmont Healthcare.

8. Can Piedmont help me spread the word about my event?

Yes. As soon as your event has been approved, we are happy to promote it on the Piedmont Foundation website.

How Can Piedmont Support Your Event?

To support your event, Piedmont can:

- Advise and provide guidance on organizing a fundraising event
- Acknowledge event organizer for direct contributions
- Approve the use of name and/or logo (The event organizer must obtain permission from Piedmont to use the Piedmont name, and all materials with Piedmont's name and/or logo also must be approved before they are distributed.)
- Provide a letter of support to validate the authenticity of the event and its organizers
- Provide patient stories through brochures and DVDs
- Send a Philanthropy department staff member or other representative (including Foundation board members) to attend the event (However, given the number of staff available to attend events and the high volume of events each year, we cannot always guarantee this.)

To support your event, Piedmont cannot:

- Release donor, volunteer, employee, physician or other mailing lists for the purpose of additional solicitation of funds by outside groups
- Offer funding or reimbursement for expenses
- Guarantee promotion of an event through Piedmont's publications and media outlets
- Be responsible for selling tickets for events
- Be responsible for providing staff or volunteer support leading up to the event
- Guarantee staff or volunteer participation at the event, or patient family attendance
- Provide facilities to hold the event
- Extend our tax exemption
- Provide Piedmont hospitals letterhead, place event fliers, posters or other promotional material throughout each hospital
- Provide individual receipts to those who support the event
- Serve as a registration source for events such as on-line registration or RSVP's.

Sample - Event Budget

Provided below is an in-depth list of items that could potentially cause expenses in your budget. Many events will not need as in-depth of a budget.

Potential Location Costs:

Site rental fee	\$ _____
Projected tips	\$ _____
Permit(s)/license	\$ _____
Additional labor	\$ _____
Subtotal	\$ _____

Potential Rental Needs:

Heat/air	\$ _____
Furniture	\$ _____
Pipe & drape	\$ _____
Carpeting/flooring	\$ _____
Props/tents/canopies	\$ _____
Stanchions/ropes	\$ _____
Labor	\$ _____
Subtotal	\$ _____

* Make sure your cost includes delivery, set up, and tear down. Be clear with delivery date when ordering!

Potential Food & Beverage Costs:

Food/catering	\$ _____
Beverages/bartender	\$ _____
Equipment (ex. steamer for hot dogs)	\$ _____
Linens, glasses, utensils, plates, etc.	\$ _____
Labor/staff	\$ _____
Gratuities	\$ _____
Tax	\$ _____
Health permits	\$ _____
Misc. charges	\$ _____
Subtotal	\$ _____

* Make sure there is enough food for the number of guests you expect and work closely with your caterer or friends to minimize cost.

Potential Entertainment Costs:

Television monitors	\$ _____
Recorders/cameras/film	\$ _____
Overhead projector	\$ _____
Podiums/microphones	\$ _____
Sound system	\$ _____
Walkie-talkies	\$ _____
Technical staff/labor	\$ _____
Music/talent fees	\$ _____
Other	\$ _____
Subtotal	\$ _____

* Is everything compatible? Do you need Internet access? Think of any questions before you contact a vendor to minimize potential problems.

Potential Lighting Costs:

Special lighting	\$ _____
Generator/extension cords	\$ _____
Set-up labor	\$ _____
Subtotal	\$ _____

Decorations and Supplies

Event/stage/table décor	\$ _____
Stage backdrop	\$ _____
Flowers/plants	\$ _____
Specialty linens	\$ _____
Chair covers	\$ _____
Signs/props	\$ _____
Paper supplies	\$ _____
Misc. charges	\$ _____
Labor	\$ _____
Subtotal	\$ _____

Trash Removal Considerations:

Water Hookup	\$ _____
Restrooms/port-o-potties	\$ _____
Dumpsters/trash service	\$ _____
Disposal service	\$ _____
Cleanup crew	\$ _____
Supplies	\$ _____
Misc.	\$ _____
Subtotal	\$ _____

Security

Facility \$ _____
 Private \$ _____
 Subtotal \$ _____

Insurance

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

Promotions:

Advertising \$ _____
 Business Cards \$ _____
 Brochures \$ _____
 Media Kit \$ _____
 Registration Packets \$ _____
 Posters \$ _____
 Flyers \$ _____
 Invitations \$ _____
 Tickets \$ _____
 Paper/envelopes \$ _____
 Specialty items \$ _____
 Photocopies \$ _____
 Subtotal \$ _____

Misc. Printing/Specialties

Menus \$ _____
 Program \$ _____
 Maps \$ _____
 Name tags \$ _____
 Place cards \$ _____
 Prizes \$ _____
 Frames \$ _____
 Thank you cards \$ _____
 Other \$ _____
 Subtotal \$ _____

Sample - Sponsorship Letter

Date

Name

Title

Company Name

Address

City, State Postal Code

Dear (Contact Name),

I am writing to invite (Company Name) to be involved in an exciting community event for a great cause.

(Your Organization Name) is busy planning our exciting new event, (Name of Event), with the proceeds going to (designate which hospital and which area of the hospital you would like). This year's event will be held on (date) at (location). It promises to be a first class event and an excellent opportunity for local businesses to associate themselves with a worthwhile cause.

We would like to ask for your support of this event through the donation of (sponsorship) or (donation). Your contribution will be greatly appreciated.

The Piedmont Healthcare Foundation is the fundraising arm for Piedmont Healthcare. The Foundation serves exclusively for the philanthropic scientific, educational and charitable purposes that benefit Piedmont Healthcare (Piedmont Hospital, Piedmont Newnan, Piedmont Fayette Hospital and Piedmont Mountainside Hospital). Comprised of a distinguished and broad spectrum of local, professional, business and civic leaders, the Foundation Board takes seriously its charge to enable and enhance the philanthropic endeavors of Piedmont. To find out more about giving opportunities or to make a donation call 404/605-2130.

I would be happy to speak with you about how you can help make this year's event a success. I can be reached at (contact info).

Sincerely,

Name

Contact Information

Sample – Acknowledgement Letter

Date

Name

Title

Company Name

Address

City, State Postal Code

Dear (Contributor Name),

On behalf of the (Your Organization Name), thank you for supporting (Event Name) on (Event Date). With your generous giving, the event raised more than (Event Fundraising Total) for the Piedmont Healthcare Foundation.

The Piedmont Healthcare Foundation is the fundraising arm for Piedmont Healthcare. The Foundation serves exclusively for the philanthropic scientific, educational and charitable purposes that benefit Piedmont Healthcare (Piedmont Hospital, Piedmont Heart Institute, Piedmont Newnan, Piedmont Fayette Hospital and Piedmont Mountainside Hospital). Comprised of a distinguished and broad spectrum of local, professional, business and civic leaders, the Foundation Board takes seriously its charge to enable and enhance the philanthropic endeavors of Piedmont

Piedmont Healthcare could not do what it does without the generous support of a caring community. Thank you again for your thoughtful gift.

Sincerely,

Name

Contact Information