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## 8 Steps for a Successful Fundraiser

### 1. Choose a Fundraiser

What kind of fundraiser do you want to hold? Here are a few suggestions:

- Art show
- Neighborhood walk or run
- Casual days at work
- Bake sale
- Craft sale

### 2. Set a Timeline

Start early to give people ample time to donate. A solid guideline is at least four months, but no less than 60 days before your event.

### 3. Contact Marshfield Clinic

Our fundraising team is here to help guide and support you throughout your planning process. We can provide you with tips, guidelines, and resources to ensure your event is a success.

### 4. Gather Your Team & Set a Goal

Get your friends and family involved. As a team, identify talents and skills that can help your fundraising efforts. You'll also want to set a realistic but challenging goal and share this information with your team.

### 5. Ask!

Don't feel afraid or guilty about asking. You will find that people will be honored to be included in your project. Lots of people plan on donating, but simply forget due to your email getting buried in their inbox. Follow up and encourage them to donate early.

### 6. Spread the Word Loud and Proud

Create flyers, send invitations, make phone calls, and use social media to show your friends and family how they can help. Make sure your audience understands what your fundraiser is about, who it will help, and why it is important to you.

### 7. Lead by Example

Inspire others to donate by making the first donation yourself. Make your donation the same amount you hope for you supporters to contribute and encourage others to match it.

### 8. Share Your Success

After your event is over make sure you thank everyone that made it possible. Marshfield Clinic is happy to help spread the word as well!

## Fundraising Timeline

### 2-3 Months Before Fundraiser: Start Planning!

- Choose a Date and Time.  
Make sure the dates and times you choose will be convenient for your target audience.
- Choose a Location.  
You can hold your fundraiser at your home, local park, church, community activity center, or wherever you feel is most appropriate for the kind and size of event you will be holding.
- Form a Planning Committee.  
Friends and family are the best volunteers to help with your event. Don't be afraid to ask for help. Delegate tasks to everyone on your team, and have fun working together.

### 3-4 Weeks Before Fundraiser: Start Promoting!

- Get Creative.  
Successful fundraisers often use flyers and posters, e-vites, and social media to get the word out.
- Double Your Donation.  
See how local businesses or sponsors in your area can contribute to your fundraiser by asking about a matching donation program. Many businesses will be happy to match employee donations and assist in your fundraising efforts.
- Stay Organized!  
Keep track of your planning and donations by recording everything. Included in this tool-kit are forms to help you stay organized, including several forms. Don't forget to complete the Post-Event Information Form to be featured in our BenchMarks magazine.

### Week of Fundraiser: Prepare, Prepare, Prepare!

- Re-Group!  
Hold a meeting a week before the event. Distribute a final event timeline to each committee member and discuss assignments.
- Run-Through.  
Walk through the event in your head and talk it out with your volunteers. Make sure nothing falls through the cracks and create a 'Plan B' in case of weather, or something happening that could be unforeseen.

### Day of Fundraiser: Celebrate & Execute!

- Set Up Your Event Space Early.  
Arrive at your event space as early as the venue will allow and begin setting up. Remember that you don't have to do everything. Enlist a couple of your team members to:
  - Record Your Fundraiser.  
Have a friend or family member take pictures and video of the event. Don't forget to send a few photos to [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org) after your event. Your fundraiser may be featured in our BenchMarks magazine!
  - Speak About Marshfield Clinic.  
Designate a time to speak to your guests about Marshfield Clinic and our mission. Tell about why the cause is important to you. Consider finding a family member or friend that has been affected by the cause you are supporting to give a testimonial at your event.

### After Your Fundraiser: Follow-Up & Reach Out!

- **Share Your Photos and Video.**  
Share your photos and video of your fundraiser on your Facebook, Twitter, Instagram, and other social media sites. Submit your photos to [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org) and show us your great work. Tell us about your event and share a story with us.

- **Send in Donations.** You can mail your proceeds\* to:  
MCHS Foundation – 1R1  
Attn: Mary Beth Knoeck  
1000 N Oak Ave  
Marshfield, WI 54449

\*Please make all checks payable to Marshfield Clinic. Have your donors place the name of your fundraiser on the memo line of their check, or include a note letting us know that their contribution is going toward your fundraiser.

- **Thank Your Guests!**

Your guests were instrumental to the success of your fundraiser. Send them a thank-you note to tell them how important their contribution was to you. You can encourage others to “pass the baton” on and create their own fundraisers. Businesses, clubs, schools, and friends will be inspired by you and want to continue on with the Marshfield Clinic mission.

## Guidelines

Marshfield Clinic is truly grateful for your support and we ask that the following guidelines be followed as you plan your event. These guidelines have been developed to make this process as efficient and straightforward as possible.

### 1. Approve all Materials

All printed materials (flyers, t-shirts, banners, etc.) for your fundraiser with Marshfield Clinic's name or logo must be approved by Marshfield Clinic Foundation prior to distribution. Any use of the Marshfield Clinic logo must adhere to established graphic standards. Please ask for our branding guidelines to ensure proper use. All drafts should be submitted to [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org).

### 2. Prepare all Necessary Paperwork

As a fundraiser; you are responsible for your own necessary insurance, licenses, and permits required by law. Marshfield Clinic will be held harmless from all claims and liabilities in any way related to the event.

### 3. Understand Raffle Rules

Marshfield Clinic holds Class A and Class B raffle licenses. All raffles need to comply with the state regulations. If you are going to hold a raffle or other gaming event such as bingo, read the Raffle section below. Payments made for raffle tickets and other gaming activities are not tax deductible.

### 4. Be Transparent

If you are donating a percentage of proceeds to Marshfield Clinic, please make sure your audience knows your intentions. We ask that you disclose to your sponsors and guests the amount in which their participation makes a difference, i.e. 80% of auction sales, \$10/ticket, or 100% of the net profit.

### 5. Costs

All costs - like rental space and catering - must be covered by the organizers. The organizer of the event is also responsible for all sales tax requirements.

### 6. Tax Receipts and Acknowledgements

Official tax receipts will be only be generated by Marshfield Clinic for cash and non-cash donations\* over \$100. Receipts will only be generated when complete donor name and address information is provided.

\*Please be aware that the following items are not tax deductible and will not receive an acknowledgement or tax receipt from Marshfield Clinic: raffles or payment for gaming-style activities, registration fees, or auction purchases.

### 7. Be Timely

Marshfield Clinic asks that you send in the donations from your fundraiser within 30 days of the event.

## Frequently Asked Questions

### What can Development do to help with my fundraising event?

We are excited to partner with you to ensure that your event is a success. Our fundraising team is here to help guide and support you throughout your planning process.

#### How We Can Help:

- Offer advice on event planning and fundraising
- Assist you in designating your contribution to a specific area of interest that has special meaning for you or your group.
- Provide wording to explain the use of funds generated by the event.
- Provide a letter of authorization to endorse your event.
- Assist with event promotion through Clinic publications such as the Pulse and the Bulletin Board and Facebook.
- Provide up to 50 copies of brochures, fliers or other promotional materials.
- Assist with donor, participant and sponsorship stewardship.
- Include your event in our BenchMarks Magazine.

#### We are unable to:

- Solicit sponsors, prizes or publicity for your events.
- Provide registration services.
- Share e-mail or mailing lists of donors, vendors, staff or patients.
- Provide assistance with event promotion outside of Clinic publications.
- Guarantee on-site staff support for your event.
- Cover the costs of your event expenses.

### How do I make my donation?

Contact Marshfield Clinic Development at [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org) to set up a check presentation, or mail the proceeds from your event to:

MCHS Foundation – 1R1  
Attn: Mary Beth Knoeck  
1000 N Oak Ave, Marshfield, WI 54449

Please include the Revenue Submission Form to ensure proper acknowledgement and tax receipting.

All checks should be made payable to Marshfield Clinic. Have your donors place the name of your fundraising event on the memo line of their check, or include a note letting us know that their contribution is going toward your fundraiser.

### Can I accept the bulk of the donations and write Marshfield Clinic one check?

Yes, however, if the check is from your account, you, not your donors, will receive a tax receipt from Marshfield Clinic.

**Can Marshfield Clinic donate brochures or giveaways for my fundraising event?**

Marshfield Clinic will provide up to 50 copies of any promotional materials that you have created for your event. One or two giveaway items can be provided to fundraisers based on supply. Contact MCHS Foundation at [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org) to request print materials and giveaway items.

**Will someone from Marshfield Clinic attend my event?**

Due to the overwhelming requests for representatives and event speakers, we are unable to guarantee a Marshfield Clinic representative at your event. We will make every attempt to have a representative attend, but due to the large number of fundraising events at Marshfield Clinic, we simply do not have enough staff to assist at all events.

**Will Marshfield Clinic provide registration services for my event?**

Registration services will not be offered to first time events. After the first year, if your event nets over \$10,000 in revenue for Marshfield Clinic, your event is eligible for our registration services. Marshfield Clinic can accept online registrations only.

**Will my event be in the newspaper or on the news?**

Any media coverage will need to be coordinated by the fundraiser organizer. Marshfield Clinic can provide you with appropriate media contacts upon request.

**My question is not answered here. How can I contact you?**

We are here to help make your fundraiser a success! Please contact us with any questions you may have regarding your fundraiser at [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org).

## Raffle Information

Holding a raffle requires a special license. Please seek approval from the Foundation before hosting any raffles. You will be required to track all raffle sales, as well as provide proof of winners and donation of prizes.

The following is an example of a “Class A” raffle ticket. These tickets may be sold for 270 days or less.

The diagram shows a green raffle ticket form with the following fields and labels:

- Name and address of licensed organization sponsoring the raffle:** Points to the top left section.
- Consecutive numbering on both portions of the ticket:** Points to the number '001' in the top left and top right corners.
- List of prizes with a retail value of \$500.00 or more:** Points to the '\$500.00 Grand Prize' text.
- Space for purchaser's name, address and phone:** Points to the 'Name', 'Address', 'City/State', and 'Phone' fields on the left.
- License Number:** Points to 'License No. R9999A-00200'.
- Date, time and place where drawing will be held:** Points to 'Raffle Drawing: March 1, 2006—4:30 PM' and 'Location of Drawing'.
- Cost of ticket:** Points to 'Ticket Cost \$1.00'.

State of Wisconsin Raffle Regulations state that in order for your raffle to be in compliance with Wisconsin law, you must include all the following information:

- Name and address of licensed organization sponsoring the raffle
- Consecutive numbering on both portions of the ticket
- List of prizes with a retail value of \$500.00 or more
- Space for purchaser's name, address and phone
- License number
- Date, time and place where drawing will be held
- Cost of ticket

The following is an example of a “Class B” raffle ticket. These raffles must be held on one day. Tickets must be identical but do not need consecutive numbering.



**Please Note: A copy of the raffle license must be present and displayed at the event.**

## Proposal for Volunteer Fundraising Event

*Please complete and submit prior to beginning your fundraising efforts*

### Contact Information

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Event Information

Proposed Event/Promotion Name: \_\_\_\_\_

Date(s): \_\_\_\_\_ Time: \_\_\_\_\_

Location: \_\_\_\_\_

Event Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will you raise money for this event: \_\_\_\_\_

\_\_\_\_\_

Designated area or fund to support: \_\_\_\_\_

## Volunteer Fundraiser Revenue Submission Form

Date: \_\_\_\_\_

Company or Individual: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Street or PO Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Event: \_\_\_\_\_

Fund: \_\_\_\_\_

### Donation Summary:

Registration Fees	\$
Auction	\$
Raffle	\$
Sponsorships	\$
Other	\$
<b>Total</b>	<b>\$</b>

Cash \$ \_\_\_\_\_

Checks \$ \_\_\_\_\_

Additional Comments about the event: \_\_\_\_\_

Marshfield Clinic Contact person: \_\_\_\_\_

### Please return this completed form to:

MCHS Foundation– 1R1

Attn: Mary Beth Knoeck

1000 N Oak Ave, Marshfield, WI 54449

Phone: 715-389-3258 Email: [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org)

## Gift-In-Kind (Non Cash) Donation Form

Date: \_\_\_\_\_

Company or Individual: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Street or PO Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Item/Service Donated – *Please provide a detailed description of item or services donated.*

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Event: \_\_\_\_\_

Fair Market Value: \$ \_\_\_\_\_

*This figure should reflect the actual cost to attain this item, or the expense of the materials to create it.*

Marshfield Clinic Contact: \_\_\_\_\_

**Please return this completed form to:**

MCHS Foundation– 1R1

Attn: Mary Beth Knoeck

1000 N Oak Ave, Marshfield, WI 54449

Phone: 715-389-3258 [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org)

## Post Event Information

If you would like to share your success with others, please include a full description of your event and send photos to [volunteerfundraising@marshfieldclinic.org](mailto:volunteerfundraising@marshfieldclinic.org).

Fundraising Group/Individual: \_\_\_\_\_

Address: \_\_\_\_\_ City/State/Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_ Event Location: \_\_\_\_\_

Amount Raised: \$ \_\_\_\_\_

Description of Fundraising Activity (you may attach another page if you need more space):

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Describe why you decided to fundraise for Marshfield Clinic:

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Yes! Share our fundraising success with other Community Volunteers. Marshfield Clinic has permission to use our story, quotes, details of our fundraising activities and photographs to inspire other volunteers to help raise funds in their community.