



# UCSF Community Fundraising Event Tool Kit



**UCSF**

University of California  
San Francisco

# Be a Community Fundraiser

Thank you for your interest in supporting UCSF by hosting an event! UCSF is dedicated to promoting health worldwide through advanced biomedical research, graduate-level education in the life sciences and health professions, and excellence in patient care.

We are grateful for the commitment and generosity of people like you who raise funds for the hospitals and the patients in our care. Community fundraisers not only raise money but also celebrate occasions, honor or remember loved ones, increase awareness, and much more. This tool kit will provide resources and best practices to help you run a successful event.

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**Community fundraisers bring in contributions that enable UCSF to continue to thrive. Thank you again for your support.**

## We are here to help

UCSF staff can assist with your event by:

- Offering advice on event planning
- Providing tax receipts for donations made directly to UCSF
- Providing UCSF logos, remit envelopes, and other marketing materials
- Providing a letter of authenticity
- Assisting with publicity for your fundraiser where possible

If you have any questions, please contact us:

 (415) 476-9160

 [giving@ucsf.edu](mailto:giving@ucsf.edu)

# Event Logistics

Before planning your event, there are many logistics to consider.

Below is a step-by-step guide to help you get started.

## 1. Choose the right event for you and your network

See the Ideas section on the next page to help inform your decision, and be sure you and your team can allot sufficient time to ensure that the event will be successful. Choose an event that your network is passionate about, and make sure to select an event location that's convenient, visible, and safe. When selecting a date, be aware of holidays, school schedules, and other events in your community.

## 2. Let our team know

Complete our Community Fundraising Application. After your application is approved, you'll receive information about how to get your event listed on our website, publications, and best practices from our staff.

## 3. Form a committee

Bring together a group of people who are enthusiastic about your cause and have the time to make the event a success. Consider how many volunteers you will need; a bake sale may only need one other volunteer while a golf tournament might require five or more. Assign roles according to your team's strengths and interests. Schedule meetings or calls throughout the planning process to make sure you stay on track.

## 4. Develop a timeline

Start early, stay organized, and plan ahead! A detailed timeline will help you plan every step necessary for a successful event from start to finish. See our template on page 7.

## 5. Create a budget

Develop a detailed budget of expenses and income. Try to keep expenses low to maximize your donation to UCSF. Your event will raise awareness but should be primarily geared toward fundraising. Determine whether any items in your budget could be donated by local businesses. Use this to set a realistic – but challenging – fundraising goal for your event.

## 6. Publicize the event and collect donations

To make the most of your resources, determine the best way to reach your network. (See "Promoting Your Event" on page 6 for more information). Depending on the type of event, you might collect donations or pledges, charge admission, or sell goods or services.

## 7. Host your event

Consider preparing a day-of folder that includes an event timeline, vendor contact information, registration lists, and other important information. Make sure you have volunteers on the day of your event – don't assign yourself a role if possible. Take a moment to thank your guests and explain why supporting UCSF is important to you. Don't forget to have fun!

## 8. Mail donations

Send us the money you raised as check or cash. Please indicate that the funds were raised from your event. Send donations to:

UCSF Foundation  
Box 45339  
San Francisco, CA 94145-0339

## 9. Share your success

Share your event success story with our team. We would love to let you know how the funds your event raised made a difference at UCSF. Don't forget to schedule the date for next year's event!



# Ideas

Different amounts of time and resources are required, depending on the type of event. Below are some ideas and level of commitment required for each:

## Low Scale

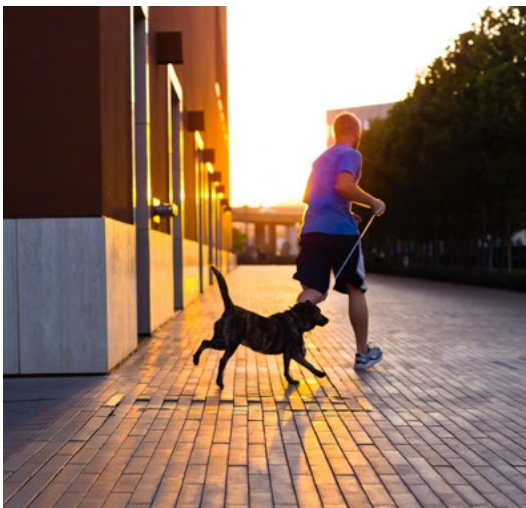
- Bake sale
- Lemonade stand
- Office dress-down
- Yard sale
- Car wash
- Backyard barbecue

## Medium Scale

- Wine tasting
- Picnic or family carnival day
- Theme party at home
- Game night
- School fundraiser

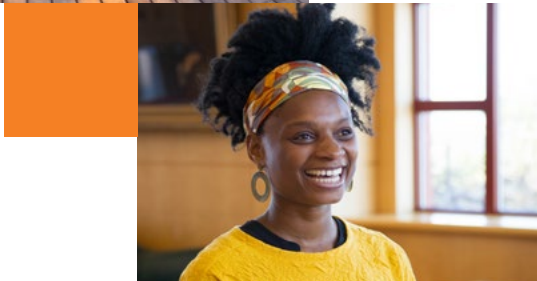
## High Scale

- Talent or fashion show
- Organized walk, run, or other sporting event
- Gala
- Golf tournament
- Benefit concert



Another low-scale way to raise money is to “piggyback” on an existing event. For example, if a race in your community benefits a new charity each year or your company hosts an annual charitable event or campaign, you can pitch the idea of an event benefitting UCSF.

**We always learn about new fundraising events from our community. If you have an idea, please share it with us, and we can help determine the amount of time and resources that will be required.**



# Promoting Your Event

Publicity is an important aspect of every event. Consider the following:


## 1. Create a communications plan


Work a plan into letting your network know about the event and put it into your timeline.

## 2. Utilize social media

Determine which options make the most sense for your audience:

### Facebook and Twitter


 **Facebook:** Create a page for your event and invite your friends to like the page. Try to update your page frequently to get more followers and shares.

 **Twitter:** Start tweeting about your event. Short, catchy lines work best. Follow other similar people or organizations to build your followers, and be sure to respond to anyone who retweets your message.

### Other Social Media

Don't forget other channels!

 **LinkedIn**

 **YouTube**

 **Google+**

 **Pinterest**

 **SnapChat**

 **Instagram**

### Create a #Hashtag

You can create a unique hashtag that will enable your followers to see all posts related to your fundraiser in one glance. It will track all conversations about your fundraiser as opposed to only those generated by your page.

## 3. Remind your network

Send emails, messages, and posts to remind guests to register and/or donate.

The best email open rates occur between 9 and 11 a.m. Tuesday through Thursday.

## 4. Spread the word outside your network

Draft a press release to send to local media outlets (TV, radio, magazine, newspapers, and bloggers). If your story is picked up, be sure to share it on social media. If not, ask if they can share your fundraiser on their publication or website calendar.

## 5. Consider traditional media

If your network is not active online or with social media, you can opt to send traditional printed flyers or letters with information about your fundraiser.

## 6. Recap your event

Post pictures and recaps on social media after the event. Review tracking and analytics to know which channels were most effective.

### Contact us to learn more about how UCSF can help with:

- Providing flyers and donation forms if they are available
- Adding your fundraiser to our calendar and including it in written and electronic communications (space and scheduling permitting)
- Sharing UCSF social media pages and handles
- Contact us at (415) 476-9160 or [giving@ucsf.edu](mailto:giving@ucsf.edu)

**Remember:** Send all promotional materials to UCSF for approval before sharing publicly.

# Templates and Tools

We have provided a set of templates and tools that will help you with your planning. Download the files below or visit [giving.ucsf.edu/fundraise](https://giving.ucsf.edu/fundraise).



[Timeline Template \(Excel\)](#)



[Budget Template \(Excel\)](#)



[Sponsorship Letter Template \(Word\)](#)

# Frequently Asked Questions

## Why am I required to fill out a Community Fundraiser Application?

UCSF adheres to regulations imposed by the IRS in order to maintain our 501(c)3 tax exempt status. We review community fundraisers to ensure they are in compliance with these rules as failure to comply could put UCSF's tax-exempt status at risk. We also want to ensure that the strength and integrity of the UCSF brand is upheld through the promotion and execution of your fundraiser.

## When do I need to submit my Community Fundraiser Application for approval?

Sponsors must complete and submit an application at least 90 days before the proposed fundraising activity. If your fundraiser is scheduled to take place within the next 90 days, we still require an application; please contact us as soon as possible. Approval will be granted on a case-by-case basis. Please allow a minimum of 15 days for application approval.

## Will the UCSF Events team be able to help me organize my fundraiser?

Unfortunately, the UCSF Events team does not have the capacity and resources to assist. The Community Fundraising Event Tool Kit was designed to help community fundraisers plan and manage their fundraising activities. If you have questions, please contact us at (415) 476-9160 or [giving@ucsf.edu](mailto:giving@ucsf.edu) for additional information.

## Can I use the UCSF name and logo to promote my fundraiser?

Yes! Remember that UCSF is the beneficiary, not the sponsor, of all benefit fundraisers and activities. Promotional materials and sponsor letters that use the UCSF name or logo should use the terms "proceeds to benefit UCSF" or "benefitting UCSF." Please do not imply that UCSF is sponsoring your event or activity. All event and promotional materials must clearly state the percentage of proceeds and/or the portion of the ticket price that will benefit UCSF.

The UCSF logo must not be altered in typeface, color configuration or position. UCSF will provide the logo and logo standards to the sponsor and must approve in writing all uses of the UCSF logo in advance of its reproduction, printing, or disbursement (marketing, flyers, press releases, and website content). All use of the UCSF logo must comply with UCSF brand standards.



### Can I split my event proceeds between UCSF and another organization?

Yes, as long as you clearly state how the proceeds will be distributed in your promotional materials. You should send UCSF a check only for the amount you intend it to receive. UCSF will not be able to cut a check to split proceeds with other organizations on your behalf. UCSF reserves the right to approve any and all co-beneficiaries.

### Can I serve alcohol at my event?

If you are interested in serving alcohol at your event, UCSF may ask your venue to supply a liquor license number or a copy of the license. UCSF requires that the event sponsor comply with all applicable state and local laws and regulations. For safety purposes, ensure that food and nonalcoholic beverages are available, ID checks are provided so underage attendees are not served alcohol, and taxi information is on hand for attendees who need a ride home.

### Does UCSF offer advice on preferred catering companies, printers, and event registration tools?

Yes! Please contact us for more information.

### What do I need to know about getting insurance for my event?

Depending on the type of the fundraiser you are planning, you may need to get general liability insurance coverage. Usually the venue has a policy, and UCSF may ask you to provide a copy for our records. UCSF does not provide insurance coverage for community fundraisers.

### Can I hold a silent auction, live auction, or raffle?

Silent and live auctions can be held at your event. If you are planning to hold an auction, please let UCSF know so we can ensure you have appropriate documentation in order to receipt donors. You are permitted to hold a raffle if you are eligible to apply for raffle registration with state or local government agencies. Please ensure that you allow enough time to acquire necessary licensing before your event. UCSF is not able to provide its tax ID information to apply for raffle registration.

### Do you get a tax deduction/donation receipt as the host of an event?

The host is eligible for a tax donation for a personal donation made directly to the UCSF Foundation. However, per IRS regulations, the donor is not eligible to receive a deduction for the amount raised and donated through the event or any in-kind goods or services spent on the event.

### Will donors to my fundraiser receive a tax receipt from UCSF?

- Donations made directly to UCSF will receive a tax receipt.
- If a check donation is written in the name of the sponsoring individual or sponsoring organization, UCSF will not be able to issue a tax receipt for that donation because UCSF will not be able to verify that gift to the IRS.
- A person, company, or venue that makes an in-kind donation of goods or services to your fundraiser is not eligible to receive a tax deduction or donation receipt for the donation.

### Why does UCSF need to see my sponsor list?

Several individuals, groups, and corporations in San Francisco and across the Bay Area have supported UCSF for many years. By reviewing your sponsor list, we will ensure that fundraising efforts aren't being duplicated.

### I want to donate a percentage of sales from my business to UCSF. Do I still need to fill out the application?

Please contact Meghan McMurray at the phone number or email address below to share details of your proposed partnership. UCSF will need to gather details and review the terms of the donation, but you may not have to fill out the full event application.

## Start Your Application

Thank you again for your interest in hosting an event to support UCSF!  
If you're ready to begin planning, please visit [giving.ucsf.edu/fundraise](https://giving.ucsf.edu/fundraise) to learn more about next steps.

### Review the Guidelines

Before you start your application, please review the UCSF Fundraising Event Guidelines at: [giving.ucsf.edu/fundraise/event-guidelines](https://giving.ucsf.edu/fundraise/event-guidelines)

If you have additional questions or need more information, please contact us at (415) 476-9160 or [giving@ucsf.edu](mailto:giving@ucsf.edu).