



Raising Funds for OHSU



Thank you for your interest in making Oregon Health & Science University the beneficiary of your fundraising efforts. We are very grateful for the volunteers and organizations whose committed efforts raise support for OHSU's programs.

At OHSU, we take on the toughest questions and the biggest challenges. Curing AIDS. Preventing blindness. Defeating cancer.

We are the torchbearers, leading the way to transform human health. We don't let up, because to us, the impossible is unacceptable. Together, we can illuminate the next discovery. We can map the next frontier of medicine and wellness. And we can't do it without you.

We are grateful for the committed supporters and volunteers who work tirelessly to raise funds for OHSU programs.

This guide outlines our promotional, financial and gift processing policies. To help ensure that volunteer events and cause marketing promotions are successful, make best use of limited staff resources, and are coordinated with our other activities, please carefully review our fundraising guidelines and submit a proposal well in advance of the proposed fundraiser or initiative for required approval by the OHSU Foundation.

For more information, please contact:

Lisa Nolen

503-552-0681

ohsufinfo@ohsu.edu



Center for Women's Health Circle of Friends

General Guidelines and Policies

- The OHSU Foundation must approve all community fundraising events and cause marketing campaigns and reserves the right to deny any request for a fundraising initiative that fails to comply with any municipal, county, state and/or federal law. Additionally, the OHSU Foundation reserves the right to deny any event or initiative that does not appropriately reflect the mission and values of OHSU and the OHSU Foundation.
- OHSU or the OHSU Foundation is unable to produce, manage or staff approved fundraising initiatives.
- The OHSU Foundation must be notified in advance if another organization(s) will also benefit from your initiative or participate in raising funds.
- OHSU Foundation fundraising policy prohibits the use of telephone solicitations by a third party for contributions from the public.
- For confidentiality reasons, OHSU/OHSU Foundation cannot release donor or volunteer lists to an individual, company, group or organization. Also, OHSU does not sell goods or services from outside organizations.
- If alcohol is being served at your event, you are responsible for ensuring all necessary licenses and permits are obtained. The OHSU Foundation will not take out liquor licenses for third-party events.

Financial Policies

- The OHSU Foundation will not assume any legal or financial liability associated with your event, nor will we indemnify you or any party involved in your event for any damage, expense, or other costs arising from or in any manner related to your event. The OHSU Foundation and all related entities are not liable for any injuries sustained by event volunteers or participants related to your event and cannot assume any type of liability for your event.
- In accordance with IRS regulations, the individual or organization conducting the fundraiser is responsible for disclosing to donors the exact dollar amount or percentage of their gift which will benefit OHSU.
- If applicable, you will be responsible for obtaining your own liability insurance to cover the event. The OHSU Foundation and OHSU will not insure your event and require that you obtain all insurance, including premise liability and worker's compensation. You agree to indemnify and hold the OHSU Foundation and OHSU and its employees, agents and representatives harmless from and against any and all claims, demands, liabilities, expenses, losses, damage, and attorneys' fees arising from or in connection with the event.
- You are responsible for obtaining all permits and licenses — especially those for raffles or games of chance. Oregon law requires special licensing to conduct a raffle. If you or your organization would like to conduct a raffle, individuals and/or organizations must obtain a raffle license from the Oregon Department of Justice: http://www.doj.state.or.us/charigroup/gaming_oregon.shtml
- You agree that you will not use OHSU Foundation's tax exemption in any manner or as part of the promotion of your event, nor will you represent to the public that you enjoy any tax-exempt rights or privileges as a result of your role in the event (unless you have separate tax-exempt status), nor will you state that any portion of the purchase price for any goods or services at the event is tax deductible for charitable purposes.
- Silent auction items should each be valued at the fair market value. This value must be listed on the bid sheet at the auction table or included in any printed list of auction items, including live auction item descriptions.
 - Items valued at \$5,000 or more require an appraisal by a qualified appraiser, per IRS guidelines.
 - If an item is not valued, or valued as priceless, the final auction bid establishes the item's fair market value, therefore no portion is tax deductible. Autographed items are deemed priceless.
 - Fair market value of the item must be disclosed in order to provide gift credit. The charitable portion is that above the fair market value.



Oswego Friends of Doernbecher



Softball Tournament

Promotional Policy

- Publicity may not suggest that the event/initiative is being sponsored, co-sponsored or produced by OHSU, and must clearly state that OHSU is the beneficiary.
- All publicity involving the OHSU name must be approved by the OHSU Foundation and OHSU prior to production, distribution and/or release. We request lead time of two working days to review and approve references to OHSU in general printed materials, and lead time of five working days to review and approve proposed references to OHSU in press releases.
- Press releases, public service announcements, advertisements, printed materials (posters, brochures, invitations, etc.) are the responsibility of the individual/organization coordinating the initiative. OHSU and the OHSU Foundation cannot commit to promoting third-party fundraising initiatives through social media channels or other means.
- The OHSU logo may not be used in third-party news releases regarding fundraising campaigns in which OHSU is the beneficiary. Limited exceptions may be considered on a case-by-case basis upon completion of fundraising campaigns.
- The OHSU Foundation, in partnership with OHSU, may allow limited use of the logo by third-party fundraisers. Requests must be submitted at least two weeks in advance for consideration.



Oregon Cancer Ski-Out

Event Staffing and Support

OHSU/OHSU Foundation is unable to provide marketing or support staff (e.g. gift-processing, event organizing, recruitment of event sponsor/participants).

OHSU Foundation staff may help by providing:

- Information for distribution regarding research and care programs specific to the area your fundraiser is benefiting.
- Logoed give-away items when available.
- A letter of thanks (not a gift receipt unless the gift is directly made payable to the OHSU Foundation) to event donors.
- Recognition of funds raised in OHSU internal and external publications deemed appropriate by our staff.
- An OHSU campus or lab tour for event participants or committee organizers and a chance to meet with faculty leader(s) prior to or after the event.
- An OHSU/OHSU Foundation representative to participate in a check presentation at the event. Requests must be made four weeks in advance.
- An OHSU representative to set up a booth/table at the event to answer basic questions. Requests must be made 12 weeks in advance and fulfillment of request is subject to event size, focus and anticipated proceeds.



Rock Creek Country Club

Gift Processing Policy

- Event organizers should submit proceeds from their event within 30 days from its conclusion.
- If the third party is a 501(c)3 organization, all checks shall be made payable to, mailed to, processed by and receipted by the third party.
- If the third party is not a 501(c)3 organization and needs event revenue to pay for event expenses, all checks shall be made payable to, mailed to, and deposited into an event bank account by the third party. It shall be stated on all event materials that gifts to the event are not tax-deductible.
- Only individual checks payable to the OHSU Foundation and cash donations (equal to or greater than \$5.00) clearly labeled with the donor's information will be provided with a tax deductible receipt in accordance with IRS and state tax regulations.
- In-kind donations to community events and initiatives are not tax deductible. The OHSU Foundation can only provide receipts for a donation directly made payable to the OHSU Foundation.
- Send donations to: OHSU Foundation, MS 45, PO 4000, Portland, OR 97208.

Levels of Support — Event Benefits

Levels indicate assistance the OHSU Foundation may provide based on the expected proceeds from your event or initiative.

	\$1 to \$999	\$1,000 to \$4,999	\$5,000 to \$9,999	\$10,000 to \$49,000	\$50,000 +
Placement on OHSU or DCH event calendar					
Information for distribution regarding research and care programs specific to the area your fundraiser is benefiting.					
Use of our web-based online fundraising tool.					
Logoed give-away items when available					
Use of OHSU or DCH name as beneficiary organization, outlined in guidelines and subject to approval.					
Publication of event information and recognition of funds raised in OHSU institute internal and external publications deemed appropriate by our staff.					
An additional letter of thanks (not a gift receipt unless the gift is given directly to the OHSU Foundation for the institute) to event donors.					
An OHSU Foundation representative to participate in a check presentation at the event. Requests must be made four weeks in advance.					
An OHSU Campus tour for event participants or committee organizers and a chance to meet with a faculty leader prior to or after the event.					
Faculty speaker to attend event					



Oregon Health
& Science University
FOUNDATION

Please return your completed proposal to:

Lisa Nolen
OHSU Foundation
Mail: 1121 SW Salmon St. Suite 100
Portland, OR 97205
ohsufinfo@ohsu.edu or fax: 503 552-0671

FUNDRAISING PROPOSAL

Contact Name: _____ Title and description of proposed event: _____

Organization: _____

Address: _____ Facility and/or location where event will be held: _____

City: _____ State: _____ Zip: _____

Contact Phone: _____ Date and time of event: _____

Contact Email: _____ Ticket price: \$ _____ Contact for tickets: _____

Phone : _____

Will insurance coverage be necessary for your event? No ☐ Yes ☐

If yes, please attach proof of insurance.

Are permits required? No ☐ Yes ☐

If yes, please explain: _____

Please state what percentage of gross income will be donated to OHSU: _____ %

Projected revenue: _____

Projected expenses: _____ Anticipated net revenue: _____

Ideally expenses should represent 25% or less of the gross income for a fundraiser.

Please list any already committed sponsors or sponsors that you plan to approach for support (because OHSU/OHSU Foundation works with many businesses, OHSU may ask you to not approach certain companies for support): _____

How and when will your event be publicized? (Print, radio, TV, other) _____

What support will you need from OHSU for this event/project? _____

Please list at least one business reference we may contact: _____

I acknowledge and agree to all the terms and conditions contained in the "OHSU Community Fundraising Guidelines and Policies" attached to and made a part of this application. I understand that my event is not considered an approved event until written approval of my application is received from the OHSU Foundation. No amendment, modification, or waiver of any of the terms and conditions contained in this document shall be valid unless in writing.

Signature

Date

Your support makes a difference

Your gifts will help advance vital research, outreach and care initiatives to bring new hope to patients.

For more information, contact:

Lisa Nolen

Assistant Director of Community Involvement

503-552-0681

ohsufinfo@ohsu.edu



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