



Cleveland Clinic Third-Party Fundraising Guidelines

Definitions

A Third-Party Fundraiser (“Fundraiser”) is defined as an organization, group or individual raising money on behalf of the Cleveland Clinic Foundation (“Cleveland Clinic”) through a fundraising event or initiative.

How We Can Help

Cleveland Clinic is grateful to those interested in supporting our endeavors in education, patient care, and research. We want your event to be successful. The following guidelines have been designed for the protection of both the Fundraiser and Cleveland Clinic. The Philanthropy Institute may offer these types of support for Third-Party Fundraisers:

- Answer questions and share fundraising best practices.
- Offer event-specific guidance for your event (budget planning, timeline, review of materials).
- Provide a letter of support to assist with solicitation efforts.
- Provide an easy way to set up online fundraising pages to share with supporters.
- Coordinate event representation or check presentation, if appropriate.
- Provide Cleveland Clinic community fundraising logo.

Guidelines for the Fundraiser

Approval

- The fundraising event must be approved sixty (60) days in advance of the event by the Senior Director, Development Programs, who will ensure the event follows Cleveland Clinic guidelines and is consistent with its mission and values. Attached please find an application, along with contact information. Please note:
 - a. Senior Director, Development Programs will respond to your application within ten (10) business days.
 - b. Cleveland Clinic will not be involved in an event that promotes a political party, candidate or appears to endorse political issue(s).
 - c. Cleveland Clinic is not able to provide its tax ID number to the Fundraiser, and the Fundraiser cannot use Cleveland Clinic’s 501(c)(3) status to apply for funding. However, if a business makes a donation to the event and would like the tax-exempt number for tax purposes or to verify the tax status of Cleveland Clinic, we will provide the information to the business upon request.
 - d. Speaker or event staff representation must be requested at the time of application. Due to the large number of requests, we cannot guarantee that a Cleveland Clinic staff person (including medical staff) will be able to attend/participate.
 - e. Cleveland Clinic will not provide mailing lists for donors, patients, staff and/or employees for fundraising purposes and is unable to mail information on behalf of the event.
 - f. Each application will be considered individually. Generally, events that will not be authorized are events that:
 - Do not support the mission and values of Cleveland Clinic.

- Would potentially conflict with a marketing or public relations campaign.
- Would require Cleveland Clinic to sell tickets, coupons, etc. or involve telemarketing or door-to-door solicitation.

Permits/Expenses/Liabilities

- The Fundraiser is responsible for covering all expenses for the event. Cleveland Clinic will not incur costs for an event, and will not be able to reimburse the Fundraiser. Event costs should be deducted from the funds raised prior to sending the donation to Cleveland Clinic.
- The Fundraiser is responsible for obtaining all permits, especially those for raffles and/or games of chance. Cleveland Clinic will not be involved, in any manner, with obtaining liquor permits.
- Products or promotions for the event (i.e. t-shirts) cannot be displayed or sold at Cleveland Clinic.
- Cleveland Clinic is not liable for any injuries sustained by event coordinators, volunteers, participants, or any other individuals related to an event benefiting Cleveland Clinic or an affiliate.

Contributions and Funds Raised

- Funds raised can be used to provide unrestricted support or can be designated to support a particular institute (i.e. Cleveland Clinic Children's) or a particular program or area (i.e., cancer, heart, etc).
- If the Fundraiser is:
 - a. A 501(c)(3) organization, all checks shall be made payable to, mailed to, processed by and receipted by the Fundraiser. Event proceeds should be mailed within 90 days (preferably in one check) payable to Cleveland Clinic, PO Box 931517, Cleveland, OH 44193-1655. Please note the name of the event in the memo section of the check.
 - b. **Not** a 501(c)(3) organization, the proceeds shall be mailed within 90 days (preferably in one check) from the Fundraiser (payable to Cleveland Clinic) to the Cleveland Clinic address noted above.
 - c. If fundraiser has more than one check, made payable to Cleveland Clinic, please submit checks to Cleveland Clinic, PO Box 931517, Cleveland, OH 44193-1655 with Community Fundraising Donation Submission form.
- Cleveland Clinic will not accept funds from individuals or organizations that fail to comply with any municipal, county, state and/or federal law.
- Classy™ and GiveSmart®
 - a. The Fundraiser may elect to utilize Classy™ and/or GiveSmart® in their fundraising efforts. Classy™ and GiveSmart® are online event fundraising software tools which may help to recruit and maximize participant fundraising.
 - b. If the Fundraiser chooses to use Classy™ and/or GiveSmart®, all proceeds must be designated to support Cleveland Clinic.
 - c. The Community Fundraising team will assist the Fundraiser in the set-up process.
 - d. Contributions collected through Classy™ and GiveSmart® will be processed immediately and individual participants will become donors to Cleveland Clinic.
 - e. As a donor, Cleveland Clinic has the right to contact these individuals after conclusion of the event, which includes but is not limited to, publications, mailings and e-communications.
 - f. If the event is cancelled, Cleveland Clinic will not reverse a donation unless directly notified by the donor.

Marketing/Promotion/Publicity:

- Publicity may not suggest that the event is being sponsored, co-sponsored, or produced by Cleveland Clinic, but instead must state that Cleveland Clinic is the beneficiary. All publicity

must specifically state within the marketing materials that the event is **“benefiting Cleveland Clinic.”**

- The Fundraiser is responsible for marketing and promoting the event, including media, press releases, posters, flyers and advertising. Cleveland Clinic reserves the right to review and approve all such marketing materials in advance.
- Cleveland Clinic letterhead will not be used by the Fundraiser. If the event is approved, a letter of support will be provided to validate the event and support event solicitation activities.

Logos/Photos/Website:

- Logo use is not permitted without approval from Cleveland Clinic. This includes downloading Cleveland Clinic logos from the internet.
- Photos on Cleveland Clinic websites are the property of Cleveland Clinic, and reproduction of photos is not permitted without approval from Cleveland Clinic.
- If logo/photo use is permitted, all materials using the logo/photo must be submitted to Senior Director, Development Programs at least three (3) weeks prior to the print deadline. The submission must be "proof" quality to represent the true nature of what is being produced.
- Event logos may be developed, but must remain separate and distinct from the Cleveland Clinic logo. Cleveland Clinic reserves the right to approve Fundraiser event logos prior to it being used in print or other media.