

Dear Friend,

Thank you for considering Rogers Behavioral Health Foundation as a beneficiary of your fundraising activities. On behalf of the patients we serve, we sincerely appreciate your thoughtfulness and generosity as we work together to provide individuals and families with life-saving access to our specialty treatment programs.

Our team will work with you to provide various levels of support and assistance as you plan and hold your fundraiser or project. This packet contains the following information:

1. **Guidelines** - This document outlines basic information for your fundraising activities. Please read this information carefully.
2. **Proposal and Agreement Form** - Please complete this form and return it to our office at: Rogers Behavioral Health Foundation, 34700 Valley Road Oconomowoc, WI 53066 or to infofoundation@rogersbh.org.
3. **Frequently Asked Questions** - To answer some questions you might have.
4. **Communication Form** – To be completed and returned after your event is complete.

As a final note, the staff at Rogers Foundation will review and approve all fundraising events in advance. This is an important safeguard in preserving the integrity of Rogers Behavioral Health and the Foundation.

We appreciate your interest in fundraising for Rogers and look forward to working with you. Don't hesitate to contact me with any questions you may have.

Warmly,

Linda Schieble

Rogers Behavioral Health Foundation
262-646-1652
Linda.Schieble@rogersbh.org



Community Sponsored Event Guidelines

Rogers Behavioral Health Foundation has created these guidelines for all Community Sponsored Events proposed by organizations/businesses, groups, or individuals that wish to raise money in support of our programs and services.

- The event must be approved by Rogers Foundation before any organization/business, group or individual may publicize or conduct an event.
- According to Rogers Foundation's confidentiality policy, we will not be able to release any mailing lists for the purpose of solicitation of funds or participation in your event or project.
- Rogers Foundation reserves the right to approve only those events which represent Rogers Behavioral Health and the Foundation appropriately and cannot assume any liability for an event conducted on its behalf.
- All respective branding and trademark requirements of the organization (including written name) must be observed in the creation of the event's materials. Rogers must approve all content prior to the dissemination of any materials to any external audience. Rogers reserves the right to revoke approval for branding and trademark usage for any reason and at any time, at which point you will be required to remove all logos and event trademarks (including name) from the event materials.

Our name should be indicated as Rogers Behavioral Health or Rogers Behavioral Health Foundation when used alone or for the first time in text. After the first time use, Rogers or Rogers Foundation may be used.

- No marketing or other expenses related to your event will be chargeable to Rogers.

Rogers Foundation **may** provide the following support, pending approval of the event. Please inquire about the following:

- | | |
|-----------------------------------|---|
| • Customized online donation page | • Speaker |
| • Logo | • Rogers' informational materials and display |
| • Website/social media posts | |

Rogers **cannot** offer the following:

- | | |
|--|---|
| • Raffle license | • Liquor license |
| • Liability insurance | • Graphic design services |
| • Bank accounts or processing of funds | • Customized (event-specific) apparel and other promotional items |



Community Sponsored Event Proposal and Agreement

Event/Promotion: _____

Date(s)/time: _____ Location: _____

Sponsoring Organization/Business: _____

Contact Person: _____ Title: _____

Address: _____

City, State, Zip: _____

Phone: _____ Fax: _____

Email: _____

Event description: _____

Is Rogers Behavioral Health Foundation the sole beneficiary of proceeds? ☐ Yes ☐ No

If not, please explain: _____

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I/we have read and understand all of the Community Sponsored Event guidelines stated above. Please print your name, sign and date this form and retain a copy for your records.

Name Date

Signature

Please complete the this form, sign and date to indicate your agreement to the guidelnes and return to:

Mail: Rogers Behavioral Health Foundation
34700 Valley Road Oconomowoc, WI 53066
Email: infofoundation@rogersbh.org

Questions? Contact Linda Schieble at 262-646-1652 or linda.schieble@rogersbh.org

Community Sponsored Event Frequently Asked Questions

Due to confidentiality, Rogers Behavioral Health Foundation cannot release patient, donor, or other mailing lists for the purpose of solicitation of funds or participation in your event or project.

Can I use Rogers Behavioral Health Foundation's name and logo?

Upon approval of your fundraiser or project, you may request a digital format of our logo to use on your promotional materials. A member of Rogers' marketing staff must approve all materials that contain our name and/or logo before they are printed or distributed.

Will someone from Rogers Foundation help me plan/run my event?

A member of Rogers Foundation staff will work with you and provide support materials, but we cannot manage the event for you.

Can I use Rogers Foundation's federal tax identification number?

Rogers Foundation's federal tax identification number may be provided to verify Rogers' tax-exempt status.

Will Rogers Foundation issue tax receipts to my donors?

Rogers Foundation will provide a tax letter for all donations made directly to the Foundation. We cannot provide receipts to individuals/businesses who made donations to you (or any other organization).

Who do I make checks payable to?

Checks can be made payable to Rogers Foundation.

Can I have a raffle at my event?

You may conduct a raffle if you hold a raffle license and the raffle is compliant with your state's Department of Gaming regulations. We cannot provide or "lend" our raffle license to your event.

Will Rogers Foundation provide items for my auction?

Community Sponsored Event organizers are responsible for securing items for auctions.

Will Rogers Foundation find volunteers for my event?

Event organizers are responsible for coordinating volunteers for their event. Sometimes, upon request, a few volunteers may be available to assist.

Community Sponsored Event Communications Form

The Foundation may feature your event on our website/social media as a way to highlight your support, demonstrate the need for support, and inspire additional support. This form will help us communicate your event's details.

Name of event: _____

Organization name: _____

Primary contact for information (name and title): _____

Phone: _____ Email: _____

Date(s) held: _____ Event location: _____

Description of event: _____

How/why was Rogers selected as the beneficiary for the event? _____

Who took part in the event (employees, customers, etc.): _____

How did you promote the event? _____

How much money was raised? _____

Additional comments: _____

Photos

Description of photo(s): _____

If five or less people in photo, please list names: _____

Do you give your permission for the Foundation to share this photo and information for marketing and communications purposes:

☐ Yes _____ (Please sign to indicate consent) ☐ No

Email photos and completed form to infofoundation@rogersbh.org