

Office of Philanthropy

# Hearts in Action

Community Fundraising Toolkit





## Welcome

Thank you for choosing to host a fundraiser to benefit Trinity Health. Your support makes a meaningful difference, and we're grateful you've decided to get involved. This toolkit is designed to guide you through the planning process, answer common questions such as "Who do I contact for support?" and provide helpful guidelines to ensure your fundraiser is successful, enjoyable, and aligned with our Mission.

## What Is Hearts in Action?

Hearts in Action is a community powered fundraising initiative that invites individuals, schools, businesses, faith communities, and organizations to host their own events or activities in support of Trinity Health – Southeast Michigan. This program celebrates the generosity and creativity of supporters who want to make a meaningful impact. By engaging your own networks and community, you help raise awareness and support the compassionate care and essential programs provided by Trinity Health.

## What Is a Community Fundraiser?

A community fundraiser is an independently organized event or activity created by supporters who want to give back in a personal and meaningful way. These volunteer led efforts can take many forms, from small gatherings to large community events, and offer a powerful way to engage friends, family, colleagues, and neighbors in supporting the patients and families we serve. Whether simple or more involved, each fundraiser plays an important role in raising awareness and strengthening community support for Trinity Health.

### Examples include

- A neighborhood group organizes a small charity walk.
- A church group organizes a small bake sale after a service.
- A community group hosts a small charity car wash and donates the proceeds.

## Frequently Asked Questions

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### **Can Trinity Health help organize my fundraiser?**

We're happy to offer guidance, answer questions, and provide materials; however, we cannot manage logistics, send invitations, or cover expenses.

### **Are there any fundraisers I cannot hold?**

Fundraisers must align with our Mission and reflect a positive image of Trinity Health. We cannot endorse activities that promote unhealthy habits or behaviors.

### **Are there rules for naming my fundraiser?**

Yes. Trinity Health should not appear in the title—only as the beneficiary. Use: "A Golf Outing to benefit Trinity Health"

Not: "Trinity Health Golf Outing."

### **Can I split proceeds between Trinity Health and another charity?**

Yes. Please notify us in advance and clearly communicate this to your supporters.

### **Can I use the Trinity Health logo?**

Logo use requires approval. All materials must be reviewed before distribution.

### **Can I issue tax receipts to donors?**

Tax receipts can only be issued when checks are made payable to Trinity Health.

Note: Many contributions are not tax deductible if the donor receives a benefit (e.g., event tickets, activity entry fees, or auction items purchased at or below fair market value).

## Join Hearts in Action

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Thank you for supporting Trinity Health Hearts in Action! Your generosity helps strengthen the care we provide and makes a meaningful impact in our community.

For questions or guidance at any point in your planning, contact:

Kyle Dornan

Annual Giving Manager

Trinity Health - Southeast Michigan

kyle.dornan@trinity-health.org | 734.712.3069

# Community fundraising guidelines

To ensure a successful and compliant event, please review the following guidelines:

## Fundraising Guidelines Snapshot

- Fundraisers must comply with all local, state, and federal laws and regulations.
- Organizers are responsible for all permits, insurance, and event related expenses.
- Events must reflect the values of Trinity Health.
- All funds must be submitted within 30 days of the event.
- Use of Trinity Health’s name and logo requires prior approval.

## Legal and Financial Responsibility

- All fundraising activities must follow all applicable local, state, and federal laws.
- As the event organizer, you are responsible for securing any required permits, licenses, and insurance.
- Your event must not create expenses for Trinity Health unless agreed to in writing beforehand.
- You are responsible for ensuring that your event does not expose Trinity Health to legal claims or liabilities.
- Trinity Health does not assume any legal or financial responsibility for community organized events.

## Mission Alignment

- Events must align with the values and mission of Trinity Health.
- Please contact Trinity Health for approval before seeking sponsorships or donations from businesses, public figures, sports teams, or community leaders. This helps prevent conflicts with existing partnerships or commitments.

## Use of Name and Logo

- Trinity Health logos may not be used without written permission.
- All promotional materials—printed, digital, or online—that reference Trinity Health must be reviewed and approved before they are shared publicly.

## Representation

- Event organizers are not authorized to act as agents or representatives of Trinity Health.
- Do not open bank accounts in Trinity Health’s name.
- Do not deposit or endorse checks made payable to Trinity Health; please forward them directly to us for proper processing.





## Event Proceeds and Reporting

- Keep accurate records of all income and expenses associated with your event.
- If your participants would like a charitable tax receipt from us, please have them make their check payable to Trinity Health Michigan and leave the check in its original form before sending it to us. Once it's received, they will automatically be sent a receipt at the address listed on their check.
- Net proceeds must be submitted to Trinity Health **within 30 days** of your event. If additional time is needed, please contact us to make arrangements.

Send your donation(s) to:

Trinity Health Michigan  
Office of Philanthropy  
5305 E. Huron River Drive  
P.O. Box 995 Ann Arbor, MI 48106

## Donation Transparency

- Any fundraising promotion must clearly state that Trinity Health is the benefiting organization.
- The portion of the purchase price that will be donated (for example, "\$5 from each t shirt sold").
- Any guaranteed minimum or maximum donation amount.

## Volunteers

Organizers are responsible for recruiting and managing all volunteers needed for planning and event day activities.

## How Trinity Health Supports Your Fundraiser

- Answer questions and provide guidance throughout your planning process.
- Review and approve marketing materials that reference Trinity Health.
- Provide a letter from us to elevate the validity and authenticity of your fundraiser.
- Help you select an area at Trinity Health that would benefit from your donation and generous support.
- Offer simple, customizable templates for outreach and thank you letters.
- Coordinate a check presentation.

# Community Fundraiser Checklist



## Before your fundraiser

### Get approvals

- All community fundraising events need to be reviewed and approved prior to moving forward with the event.
- All marketing materials that include the Trinity Health logo must be reviewed and approved prior to distribution and publication.

### Determine a beneficiary

Your event can support any Trinity Health – Southeast Michigan fund, hospital, or program. Each location plays an important role in caring for our communities, and your support helps make that care possible. If you'd like guidance in choosing a specific program or area of care, our philanthropy team is here to help you explore meaningful giving opportunities.

Our Locations

- Trinity Health Ann Arbor
- Trinity Health Oakland
- Trinity Health Livonia
- Chelsea Hospital
- Trinity Health Livingston
- Trinity Health Detroit Ministries

### Establish Event Goals

Set a realistic goal based on your event type and the people you plan to invite. Even modest goals make a meaningful impact.

### Select a Date, Time, and Location

Choose when and where your event will take place. Consider convenience, accessibility, and any venue requirements such as reserving space or obtaining permission.

### Develop a budget

Identify all sources of income and expenses associated with all event expenditures.

### Promote and publicize

Identify your target audience and determine how you will promote the event, using channels such as social media, word of mouth, posters, and flyers.

## ✓ At your fundraiser

### Thank attendees

Every dollar truly makes a difference, so take a moment to thank your attendees for supporting your fundraiser.

### Take photos

Photos help capture your event and share the experience with guests.



## ✓ After your fundraiser

### Send in your donation(s) to:

Trinity Health Michigan  
Office of Philanthropy  
5305 E. Huron River Drive  
P.O. Box 995  
Ann Arbor, MI 48106

### Say thank you!

Taking time to send personal thank you messages help strengthen relationships for future support. Be sure to thank your volunteers, participants, and donors.

### Send photos to us

Email photos with a brief caption from your fundraiser. Photos help us celebrate your efforts and share the impact of your event within our community.

### Review your fundraiser

Congratulations on successfully hosting your community fundraising event! Now is a great time to reflect on your successes and identify opportunities to strengthen next year's efforts.



**Trinity Health Ann Arbor**

5301 McAuley Drive, Ypsilanti, MI 48197

**Trinity Health Detroit**

5555 Conner - Suite 2691 Detroit, MI 48213

**Chelsea Hospital**

775 South Main Street, Chelsea, MI 48118

**Trinity Health Livingston**

7555 Grand River Rd., Brighton, MI 48114

**Trinity Health Oakland**

44405 Woodward Avenue, Pontiac, MI 48341

**Trinity Health Livonia**

36475 Five Mile Road, Livonia, MI 48154



[TrinityHealthMichigan.org](https://TrinityHealthMichigan.org)

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