

Community Coordinator Manual

A stylized yellow sun logo with a circular center and several elongated, teardrop-shaped rays radiating outwards.

2501 West COTA Drive, Bloomington, Indiana 47403
Phone: 800.366.2682 Fax: 812.336.8885
CampaignInfo@cota.org
COTA.org

Welcome to the Children's Organ Transplant Association (COTA)

First of all, ***thank you!***

Thank you for taking the time to help families across the country waiting for a loved one's second chance at life.

Thank you for your willingness to lead a volunteer team through various fundraising opportunities.

Thank you for giving hope!



You and your COTA volunteer team will not only walk with the transplant family on this journey, but you will gain a greater understanding of how COTA assists families who are waiting for a second chance at life.

As your volunteers begin to implement fundraising activities, communicate with media and develop the COTA community campaign website, rest assured that COTA's team of professionals will be in frequent contact with you. Any time you have questions, concerns or simply want to talk, please let us know.

We hope this experience is a positive one for you and your volunteers. We also hope that you will gain not just the experience of leading a volunteer team, but an increased understanding and awareness of the transplant experience.

DISCLAIMER

This manual may be modified by the Children's Organ Transplant Association at any time necessary for the purpose of complying with any past, present or future Internal Revenue Service rule, regulation or court decision in order to ensure continued status as a 501(c)3 nonprofit corporation.

Children's Organ Transplant Association Mission Statement

The Children's Organ Transplant Association helps children and young adults who need a life-saving transplant by providing fundraising assistance and family support.

Children's Organ Transplant Association History

The Children's Organ Transplant Association (COTA) is a not-for-profit national charity dedicated to helping families with their transplant-related expenses and organizing communities to raise funds for COTA.

COTA was established as a volunteer organization in Bloomington, Indiana, in 1986 following a fundraising drive to place a toddler on the liver transplant waiting list. A group of concerned citizens raised more than \$100,000, which enabled the child to be placed on the list. Sadly, the boy died while waiting for a donor liver. However, his courageous struggle inspired the group to organize what today is the Children's Organ Transplant Association.

Since 1986, COTA has helped thousands of patients by organizing their families and communities to raise millions of dollars for transplant-related expenses. Additionally, COTA has distributed more than two million organ and tissue donor registration cards throughout the nation.

COTA has become the premier national organization helping families with transplant-needy loved ones. This status is due, in part, to the fact that 100% of all funds raised through COTA community fundraising campaigns assist patients with transplant-related expenses. COTA does not charge a fee nor take a percentage of the funds raised for any service.

COTA staff and volunteers have helped families in every state with individual COTA community campaigns raising a few thousand dollars to more than \$1,000,000.

Children's Organ Transplant Association Community Campaigns

COTA helps organize volunteers in communities across the country who raise funds to help families with their transplant-related expenses. All funds raised must go to COTA and COTA serves as the recipient and administrator of all funds. However, gifts may be made in honor of a specific child. COTA allocates funds raised in honor of patients to families who have a documented financial need related to the transplant.

Children's Organ Transplant Association Services

The Children's Organ Transplant Association's national headquarters serves as the central clearinghouse for training, advice and supplies for community campaigns.

COTA services offered include:

Not-for-Profit Status

Because COTA is a 501(c)3 charity, gifts to COTA are tax-deductible to the fullest extent allowable by law.

Community Campaign Development

The COTA staff works closely with key volunteers in a community to schedule a personalized training for the volunteer group. Additionally, COTA staff members are available to assist campaign volunteers before, during and after a fundraising campaign. Fundraising supplies, campaign manuals and resources are provided at no charge.

Campaign Website

Each fundraising campaign is provided a no-cost website to use for fundraising and for communications. A COTA staff member establishes the site and is available to assist with questions and ongoing maintenance. In addition, new tools are added to the site as new technology becomes available.

Ongoing Campaign Support

Ongoing assistance is available to all volunteers. COTA's professional staff members assist volunteers in planning and implementing community campaign activities and events. Tools and templates are available on the COTA website (COTA.org) in a special section devoted to campaign volunteers.

Toll-Free Telephone Service

During regular business hours (8am to 5pm EST, Monday through Friday), a COTA staff member will quickly respond to your needs and requests. All requests receive a response within two business days.

Email the COTA Campaigns Team at CampaignInfo@cota.org.

These services, and many others, are provided by COTA at no cost and are customized to each individual community campaign's needs.

Children's Organ Transplant Association Contact Information

Children's Organ Transplant Association Campaign Fundraising Staff

Kristy Brown

Kristy@cota.org

Chief Development Officer

Trains and assists Community Coordinators, supports campaign events and activities, and develops fundraising resources.

Kim Carter Parker

Kim@cota.org

Director of Communications

Trains and assists campaign Public Relations Coordinators with campaign media and publicity.

Lauren Wilmer

Lauren@cota.org

Campaigns & Outreach Manager

Trains and assists Community Coordinators and supports campaign events and activities.

Danielle Rabideau

Danielle@cota.org

Campaigns & Communication Manager

Develops fundraising resources, trains and assists Community Coordinators, assists Website Coordinators, and supports campaign events and activities.

Jillian Clark

Jillian@cota.org

Campaign Specialist

Supports campaign events and activities and assists campaign volunteers throughout the fundraising campaign.

For Approvals of Campaign Materials, Assistance with Campaign Fundraising Activities or
Ordering Supplies:

CampaignInfo@cota.org

For Assistance with Media and Public Relations:

PRInfo@cota.org

For Assistance with Campaign Website:

WebInfo@cota.org

Children's Organ Transplant Association National Headquarters

Phone Numbers

800.366.2682 (toll free)

Email Address

cota@cota.org

Web Address

COTA.org

Mailing Address

2501 West COTA Drive, Bloomington, Indiana 47403

COTA Community Campaign Structure

The Campaign Lead Volunteers

A successful COTA community campaign works best with a core group of volunteers to provide oversight, structure and strategic planning for the team.

Community Coordinator (CC)

The Community Coordinator serves as the lead contact between COTA and community volunteers. They are responsible for overseeing all campaign activities and supervising committee chairpersons. All campaign events and activities are under the oversight of the Community Coordinator. The Community Coordinator recruits the lead campaign volunteers.

Public Relations Coordinator (PRC)

The Public Relations Coordinator oversees all media contacts, press releases and publicity for fundraising activities and events. This individual works with the local media and other publicity outlets to promote activities and to tell the family's story in order to raise funds for the COTA community campaign. The Public Relations Coordinator also works closely with the Website Coordinator to ensure event and activity information is posted on the campaign website.

Website Coordinator (WC)

COTA provides every fundraising campaign with a website. The Website Coordinator works closely with the family, Community Coordinator and Public Relations Coordinator to customize the site with patient information and photos, campaign activity and event information, and contribution information. COTA will supply the website at no cost; COTA will also supply a shortened domain name unique to the COTA campaign at no cost for one year after the start of the fundraising campaign.

No other website dedicated to fundraising may be used by the family or the COTA community campaign while actively fundraising with COTA. If another site exists, COTA staff will help families and volunteers transition to the COTA campaign website. After fundraising concludes, other websites may be reactivated with links back to COTA.org or the COTA campaign website.

While the individuals filling the three lead volunteer roles do not need to know each other prior to the COTA community campaign training, it is crucial that regular communication is made between each volunteer during fundraising. A consistent message, event updates and an active online presence will benefit the team of volunteers and the community campaign.

The Children's Organ Transplant Association Patient Family Agreement

Before a community fundraising campaign begins, the patient or patient's family must formally enter into an agreement with the Children's Organ Transplant Association. Lead volunteers should be aware of some of the information included in the agreement.

The agreement includes:

Campaign Fund Accounting

COTA pools campaign funds in accordance with Internal Revenue Service requirements. COTA allocates funds raised in honor of patients to families who have a documented need related to the transplant. Statements reflecting campaign income and patient expenses are provided to COTA patients and/or their families.

Transplant-Related Expenses

'Transplant-Related Expenses' are those expenses that are necessary because of the transplant or the need for transplant. While there are some differences depending on the patient's age, COTA tries to ensure the patient's, and the patient's family's, needs are met. The following are considered 'Transplant-Related Expenses' for which the funds may be used:

- a. Medical bills related to the transplant, or the need for transplant, for the patient and donor.
- b. Prescription drugs necessitated by the transplant or the need for a transplant.
- c. Reasonable travel, lodging and food expenses for the patient and a caregiver during the patient's evaluation.
- d. Reasonable travel, lodging and food expenses for the patient and a caregiver during the patient's transplant.
- e. Reasonable travel, lodging and food expenses for the patient and a caregiver for the patient's follow-up medical examinations.
- f. Reasonable travel, lodging and food expenses for the organ/tissue donor and a caregiver during the transplant.
- g. Other expenses may be considered 'Transplant-Related Expenses' if, in the judgment of the Children's Organ Transplant Association Staff and Board of Directors, the patient's transplant or the need for a transplant directly causes them.
- h. The Children's Organ Transplant Association Board of Directors has approved that if the patient does not have life insurance, and if the funds are available, COTA may assist with final expenses up to \$5,000.

Public Scrutiny

The recipient recognizes that the public has donated all funds raised for transplant-related expenses and that both the recipient and COTA will be held strictly accountable by the public for all funds raised in honor of the individual.

Accounting for Funds

In order to help defray the cost of its services, the Children's Organ Transplant Association will retain the interest earned on all funds deposited. COTA will maintain complete and accurate records of all funds raised and will provide the family with an accounting of all funds donated in honor, or in memory, of a patient.

As part of the patient agreement signed by the COTA patient and/or family, all previous fundraising accounts will be transferred to the Children's Organ Transplant Association prior to initiation of the COTA fundraising campaign.

At a predetermined time after the start of the fundraising campaign, COTA will make a Challenge Grant and Lifetime Grant available to the community campaign for transplant-related expenses, based on the total amount raised by the campaign at that point. COTA reserves the right to determine the criteria for this program.

**NO ADDITIONAL
FUNDRAISING ACCOUNTS
MAY BE OPENED FOR THE
PATIENT UNDER ANY
CIRCUMSTANCES.**

Proceeds from all fundraising activities must be forwarded to COTA. (Failure to comply with this requirement is grounds for cancellation of the Patient Agreement.)

COTA will supply a website for the community campaign at no cost at the start of the fundraising campaign. No other website dedicated to fundraising may be used by the family or the COTA community campaign while actively fundraising with COTA.

Payment of Expenses

COTA will allocate funds to and pay for transplant-related expenses from the COTA Patient Account after all available insurance benefits and governmental programs have been exhausted. The procedure for paying such expenses will be as follows:

- a. The family forwards original invoices, bills and receipts to COTA along with a payment authorization form.
- b. COTA will determine if the invoice, bill or receipt is a justifiable transplant-related expense.
- c. COTA at its sole discretion reserves the right to make the final decision as to whether these expenses are indeed transplant-related expenses and eligible for payment.

Limit of Liability

It is understood that COTA is not liable for any expenses beyond those which can be covered by the funds allocated to the transplant patient.

Cooperation

It is further understood that the best interests of the transplant recipient can only be served by recruiting a volunteer team who will work in concert with COTA to provide hope for a transplant family in need.

Timeline for a COTA Community Campaign

COTA Patient and/or Family Partners with COTA

A family contacts the Children's Organ Transplant Association for preliminary information and receives a packet of information including the COTA Patient Agreement. The family enters into an agreement with the Children's Organ Transplant Association. COTA establishes a community fundraising campaign after the family identifies a Community Coordinator.



Campaign Website Established

COTA establishes a website for the community campaign to be used for fundraising and communications purposes. The site is available at no cost, and a shortened domain name unique to the COTA campaign is supplied for one year after the start of fundraising. **No other website devoted to the patient, fundraising or the COTA campaign may be used while actively fundraising with COTA.**

Community Campaign Training

After the Community Coordinator has received his/her preliminary orientation, and additional volunteers have been recruited, a COTA staff member will schedule a training meeting. This meeting is organized for volunteers so they can learn the specifics of the campaign and how it will work, discuss fundraising options, and ask questions related to the campaign and to COTA.

Campaign Website Updates

After the Community Campaign Training, access to editing the COTA campaign website is provided. The Website Coordinator should work closely with the family, Community Coordinator and Public Relations Coordinator to customize the site with initial patient information and photos before COTA emails the Media Alert to the local media. Then, the Website Coordinator should continue customizing the site with additional patient updates and photos, campaign activity and event information, and contribution information throughout the fundraising campaign.

Additional Volunteer Recruitment

Under the direction of the Community Coordinator, campaign volunteers begin talking to organizations, businesses and groups about volunteer opportunities. Volunteers should be invited to a community campaign organizational meeting to learn about the campaign.

Media Announcement

After the Public Relations Coordinator is trained and resources are received (including a list of media in the area), COTA emails a Media Alert to the local media. The Public Relations Coordinator then contacts the media about the community campaign's upcoming fundraising activities. Throughout the community campaign, the Public Relations Coordinator should email all media coverage to PRInfo@cota.org.

Kick-Off Meeting

The Community Coordinator, along with the lead volunteers, organizes a meeting for all volunteers to discuss the community campaign and to make plans for events and activities. The Community Coordinator conducts the kick-off meeting.

Community Outreach

The Community Coordinator continues to recruit Committee Chairs who enlist volunteers to serve on committees. In addition, clubs, organizations, businesses, churches, etc., are contacted by volunteers about the COTA community campaign. Information about upcoming activities, as well as information about the needs of the campaign (monetary donations, volunteers, assistance with resources, etc.) is made available to these groups.

Events and Activities

Campaign Committee Chairs plan and implement fundraising events and activities. Prior to each activity, the Committee Chair should contact the Public Relations Coordinator and the Website Coordinator to discuss a publicity plan for the event.

Media and Publicity

The Public Relations Coordinator publicizes events and activities as plans are made. The Public Relations Coordinator should be in close contact with Committee Chairs planning events and with the Website Coordinator about promoting activities on the COTA campaign website and on social media.

Campaign Celebration Activity

The Community Coordinator should plan an activity at the conclusion of the fundraising campaign to thank the volunteers, to reveal the amount the group raised and to announce plans for an annual COTA activity. The Community Coordinator should work with the Public Relations Coordinator to make sure local media are included in this celebration. This may be a simple activity, like a reception or a potluck dinner.

Campaign Evaluation

Each lead volunteer (and Committee Chairs, if possible) should complete an evaluation of the campaign. The Community Coordinator should ask them what they felt worked well and how they would do things differently and should also ask if they would be willing to help with future fundraising activities and events. This should be incorporated in a “Congratulations” email. Please forward these evaluations to COTA.

Miracle Maker Referrals

The Community Coordinator should refer to COTA any campaign volunteers who would be willing to help on another COTA campaign in the area, help with statewide activities and events, or serve as a spokesperson for organ and tissue donation. Please forward those names, addresses, email addresses and telephone numbers to MiracleMaker@cota.org.

Generally, COTA community campaigns require eight to 12 months of active fundraising to reach the campaign goal. However, the goal is not a measure of a team's success. It should be seen as a way to communicate the patient's transplant-related expense needs.

COTA urges you to utilize the resources throughout your community, incorporate the templates and tools provided to your campaign and to contact COTA staff members with any questions or supply requests.

Guidelines for the COTA Challenge Grant and Lifetime Grant Program

The Children's Organ Transplant Association provides a Challenge Grant and a Lifetime Grant to any community campaign that meets the program requirements, which are noted below. These funds are allocated for the benefit of transplant patients six and 12 months after the start of the community fundraising campaign. There is no need to apply for the funds as they are automatically allocated, and each COTA community campaign is immediately eligible for funding after partnering with COTA.

Challenge Grant Program Levels

All COTA campaigns are eligible for Challenge Grant funds of either \$2,500 or \$5,000. A grant of \$2,500 is awarded to COTA teams that reach \$25,000, and a \$5,000 grant is awarded when a team reaches \$50,000, within the first six months of fundraising.

Volunteers will receive email notification when the Challenge Grant is allocated.

Lifetime Grant Program Levels


COTA campaigns that maximize the Challenge Grant (reaching \$50,000 within the first six months of fundraising to be awarded a grant of \$5,000) are eligible for Lifetime Grant funds of \$2,500 or \$5,000. An additional grant of \$2,500 is awarded to COTA teams that reach \$75,000, and an additional \$5,000 grant is awarded when a team reaches \$100,000, within the first 12 months of fundraising. In total, maximizing both the Challenge Grant and the Lifetime Grant awards the community campaign \$10,000 in grants from COTA.

Volunteers will receive email notification when the Lifetime Grant is allocated.

Note: These Challenge Grant and Lifetime Grant Funds are not reflected on the COTA community campaign website's fundraising thermometer.

Where to Look for Volunteers

Having a network of volunteers will make your COTA fundraising efforts even easier. For some events, like Fun Runs and Benefit Dinners, a large group of volunteers is a must. Here are some tips for recruiting volunteers for your COTA community campaign:

1. **Ask your COTA patient's family members and close friends.** These volunteers are typically the most committed because they have a personal connection with the COTA family. Ask each family member and friend to identify 10 additional contacts they can ask to volunteer. This expanding circle can significantly increase the number of volunteers working on a COTA community campaign.
2. **Identify key organizations in your community that have been active with fundraising activities.** Most communities have service club listings in Chamber of Commerce or Convention and Visitors Bureau materials. Contact local clubs and ask to make a presentation at an upcoming meeting. At that meeting, explain the purpose of the COTA community campaign and tell your COTA patient's story; talk about the goal of the campaign; give an overview of some of the planned activities; and ask for volunteers and fundraising ideas. It is best if you have something specific to ask a club to do. If you have an upcoming COTA event or volunteer meeting, take along enough printed invitations or flyers to give each attendee.
3. **Call area high schools and colleges.** Find out the names of advisors for honor societies, service learning groups, Key Clubs, service fraternities, social sororities and fraternities, etc. Try to meet with the advisor or president to ask for their organization's support. At the very least, send a letter to the advisor and/or president explaining the COTA campaign and asking for their help. Be specific about what you want the group to do: plan a fundraiser, volunteer for a specific activity, etc.
4. **Reach out to other organizations in your community.** Churches, youth groups, hobby clubs and special interest groups may be excellent sources of volunteers. They may want to host a fundraiser for the COTA community campaign. Call these groups to find out if they would be willing to plan a fundraiser, or earmark funds from an already planned fundraiser, for the COTA community campaign.

Volunteer Training and Placement

1. When recruiting a volunteer, always have plenty of information about the COTA community campaign. Verbally share this information, but also give the potential volunteer a brief, written description so that he or she can read more after the conversation. Then ask for their help. Try to be as specific as possible, including the time commitment, number of meetings, etc.
2. Plan a volunteer meeting. The details for this meeting should be in place before going into the community to recruit volunteers. Ask all volunteers to attend this meeting to meet the patient and the patient's family, if possible, learn about the COTA community campaign and make a commitment to the fundraising effort.
3. Try to place each volunteer where they are most comfortable, and make sure to communicate the appropriate skill set for the volunteer role.

Recognizing Your Volunteers

It is very important to publicly recognize the efforts of those who support the COTA community campaign.

- Use COTA thank you note cards and envelopes to send a quick note of thanks to individuals or groups who have helped your community campaign.
- Work with the Public Relations Coordinator and the Website Coordinator to publicly thank volunteers and groups. Posting photos on the COTA campaign website can be very effective.
- Tell the media. Community groups can be inspired by the actions of others. Let the public know who made a difference in the life of a COTA patient.
- Ask your Public Relations Coordinator to send a Letter to the Editor to local newspapers thanking businesses and groups for their support. Sample Letters to the Editor are available online.
- Use customizable Certificates of Appreciation, available in the *Volunteers* area of the COTA website (COTA.org), to recognize key volunteers.
- At the campaign Celebration Event, be sure to thank groups and individuals who made the community campaign successful. Be sure to keep an accurate list, and do not forget a key supporter.

Community Campaign Volunteer Web Resources

The Children's Organ Transplant Association offers a wide variety of resources to assist with raising funds for transplant-related expenses.

Follow these steps to get to the *Volunteers* login page:

1. Go to COTA.org.
2. Click the **Volunteers** link located on the COTA website home page.
3. When you access a volunteer resource, the page will open and ask for a password. The password is **miraclemaker**.
4. After you have logged in, you will be able to access a variety of options and links.

Each week, lead volunteers will receive an email from COTA with a suggested fundraising idea, an important update or news that is vital to the community campaign. Please be sure to read these brief emails, which often have links to the *Volunteers* page on the COTA website.

COTA welcomes volunteer feedback and suggestions. Please let COTA know if there is a resource that would help future community campaigns. Based on your comments and suggestions, COTA can continue to add, improve and expand our resource materials.



"COTA provided tools to help our volunteers plan fundraising events and the COTA staff helped get our volunteers excited about supporting our family. COTA provided our campaign credibility. With COTA's ongoing help, our volunteers met our fundraising goal."

Comment from a COTA Family

COTA Policies

The Children's Organ Transplant Association (COTA) has a set of fundraising policies. These policies are in place not to deter community campaign efforts, but rather to protect campaign volunteers and enhance the community fundraising campaign.

As with all campaign resources, please contact COTA with any questions regarding COTA policies.

Alcohol Policy

Children's Organ Transplant Association events cannot have alcohol served, in any circumstance, without a liquor license and liability insurance in effect. COTA does not have a liquor license, and will not apply for a license or allow a COTA campaign to apply for a license. COTA does not provide liability insurance for any event where alcohol is served.

To serve alcohol at any COTA activity, alcohol must be served and/or sold ONLY under a liquor license and liability insurance held by someone else, AND their personnel must serve the alcohol.

COTA Campaign Letterhead Policy

All materials printed on the Children's Organ Transplant Association's campaign letterhead must be approved by COTA staff prior to printing and distribution. Download letterhead from the COTA website.

Contract Policy

Campaign volunteers should not sign contracts of any kind without COTA knowledge and approval. If the community campaign needs to sign a contract for any reason, please contact COTA for more information.

Promotional Material Policy

All promotional materials created for campaign activities, including press releases, brochures, posters, flyers, social media posts, emails, etc., must be approved by COTA prior to printing, posting and distribution. Edits are usually made within two business days of submission, but if faster approval is needed, call COTA to discuss the timeline. Typically, the Community Coordinator or Public Relations Coordinator submits approval requests. Materials may be submitted via email at CampaignInfo@cota.org, fax or mail.

Raffle and Gaming Policy

Raffles cannot be conducted by COTA community campaigns. Contact COTA before planning ANY drawing or game of chance (like a casino night) to discuss rules and gaming laws. COTA campaigns must follow all state/municipality gaming laws. Therefore, in some locations, certain gaming activities may not be used as a fundraising tool.

Community Campaign Approval Process

The Children's Organ Transplant Association requires prior notification of campaign fundraising activities. All fundraising activities managed by your community campaign team must follow COTA guidelines and policies. This includes, but is not limited to, the following:

1. All promotional materials -- including flyers, brochures, posters, emails, social media posts, solicitation letters and more -- must be approved by COTA prior to printing and distribution.
2. Any gaming activity, such as drawings or casino nights, must be pre-approved by COTA -- and state and local laws must be followed. **COTA campaign volunteers cannot host raffles.**
3. COTA strongly encourages no-cost fundraising activities and asks that all community campaigns limit expenses related to fundraising. With the knowledge that sometimes the community campaign will plan an activity where not all expenses will be donated, COTA has a procedure in place for paying fundraising expenses. All fundraising expenses that will be paid from the proceeds of the activity must be submitted and pre-approved by COTA using the Budget Worksheet. Budget Worksheets should be submitted at least one month prior to the event to ensure event income exceeds expenses. Original receipts or bills documenting expenses are required for reimbursement and must be turned into COTA after the activity. **No fundraising expenses will be reimbursed if an approved budget is not on file at COTA prior to the fundraising activity.**
4. Once promotional materials are approved, the Website Coordinator should make every effort to post the information to the COTA campaign website. Volunteers should also promote event information on social media.

Materials and budgets needing approval should be emailed or faxed to COTA headquarters.

Email	CampaignInfo@cota.org
Fax	812.336.8885

Standard response time is within two business days.

Proper planning is a key to successful fundraising. Proper planning will also help build community support for the fundraising effort. However, COTA realizes that occasionally unexpected opportunities may require immediate attention. For urgent approvals, please mark the email or fax as "urgent" in the subject line.

Procedure for Getting a Campaign Account Balance

Each COTA patient has a campaign website that will be available as long as the family is working with COTA. On the campaign website is a thermometer that shows the amount raised in honor of the patient. The community fundraising campaign volunteers should use this tool to report the amount raised.

COTA Campaign Website

- Every COTA patient receives a campaign website through which contributors can make gifts in honor of that patient.
- Gifts can be made in honor or in memory of a patient, or as a tribute in memory of another individual, on the COTA campaign website.
- The campaign website includes a thermometer that shows current fundraising totals. This should be the primary way COTA community campaigns access current fundraising totals.
- The campaign website thermometer is updated:
 - Immediately when an online gift is made.
 - Daily with contribution totals from checks that are mailed to the COTA office.

If more detailed information is needed, the Community Coordinator (or one person designated by the Community Coordinator) can pull a Contributors List for their campaign.

Contributors List

COTA provides each community campaign with a list of contributors. To access the Contributors List, a unique username and password is provided to the Community Coordinator. Once that information is received, log into the *Volunteers* area of COTA.org, click on **Community Coordinator** and then **Contributors List**. Then, use your campaign's unique username and password to access the list.

- This list contains only the names and addresses of the contributors. It is the policy of the Children's Organ Transplant Association to not disclose the amounts of the contributions received in order to protect the privacy of the contributor. Those who have asked to remain anonymous will not appear on this list.
- This list can be used for thank you cards or as a guide to the number of people who have contributed.
- This list is updated as donations are processed online and in the COTA office.

For more detailed information about the campaign account balance, contact FamilyServices@cota.org.

Guidelines for Cash, Check and Credit Card Contributions

Check Donations

- Checks should be made payable to the Children's Organ Transplant Association or COTA with "in honor of *Patient First / Last Name*" written in the memo line, then mailed to COTA at 2501 W. COTA Drive, Bloomington, Indiana 47403.
- A tax receipt letter will be sent to the contributor within 10 days of receipt of the contribution for gifts of \$75 or more.
- If a COTA community campaign volunteer or family member receives checks made out to an individual rather than COTA, that individual may endorse the checks by signing their name and adding *For Deposit Only COTA*. Mail these endorsed checks to COTA. A receipt letter is sent to the person who wrote the original check, if the contribution is \$75 or more.

Cash Donations

- Cash should be consolidated into a money order or cashier's check made payable to the Children's Organ Transplant Association or COTA with "in honor of *Patient First / Last Name*" written in the memo line, then mailed to COTA.
- Cash donations should not be deposited directly into a local or personal bank account.
- COTA does not provide tax receipt letters for cash gifts.
- **Do not send cash through the mail.**

***Please note:** If a large number of checks and/or money orders are being sent, please send the envelope or package via UPS, Federal Express or registered mail. Additional Business Reply Envelopes can be provided to the COTA community campaign at no cost. Proceeds sent in prepaid envelopes may take several weeks to reach COTA, so please use first-class postage if timely receipt of proceeds is important.*

Credit Card Donations

- Gifts can be made online securely with a credit card by clicking the "Give" button on the COTA campaign website or at COTA.org. Online contributions of any value will immediately receive an email receipt.
- A Square Credit Card Reader allows you to accept debit and credit card payments via your cell phone or tablet and direct those contributions to your COTA community campaign. This is extremely useful for various events, such as for registering 5K participants the morning of a run. If your community campaign team would like to utilize a Square Reader for an upcoming event, please contact CampaignInfo@cota.org.
- If a contributor would like to make a gift by credit card and is uncomfortable making an online contribution, they may contact COTA at 800.366.2682 during business hours (Monday – Friday, 8 a.m. – 5 p.m. EST), and a COTA staff member will be happy to process the gift.

***Please note:** PayPal, Venmo, Zelle, and other similar apps are not acceptable methods for accepting credit card contributions.*

Guidelines for Tax Receipting

When planning an event, the following rules apply for IRS charitable gift deductions:

- The IRS requires that a charitable gift receipt be provided to contributors for gifts of \$250 or more. As a matter of policy, COTA provides a charitable gift receipt letter for contributions of \$75 or more.
- For a purchase of a good/service (at an auction, for example), the total amount paid may not be tax deductible. Only the amount contributed beyond the fair market value of the good/service is tax deductible. Contributors should consult tax advisors for more information.

The checks and Gift In Kind Donation Form(s) must be sent to COTA within seven days after an event. Do not include any other checks in this packet. Attach a note of explanation with the event description, campaign name and the event chairperson's name and telephone number.

Checks and Cash Collections

If a check is written in honor of a patient, the check should be made payable to COTA. In the memo line, the contributor should write "In Honor of *Patient First / Last Name*." If possible, a COTA volunteer should confirm the address information on the check. COTA will record the contribution based on the name of the person writing the check (or the business, if applicable).

Cash collections should be consolidated into a money order or cashier's check and mailed to COTA following the above guidelines. **Do not deposit cash into a personal or local bank account.**

Receipt Letters

Receipt letters are sent to contributors who make donations via check or credit card of \$75 or more. Receipt letters must go to the person who wrote the check. COTA can send an acknowledgment letter to someone other than the check writer, indicating that a gift was given in their honor, but COTA may not receipt any gift without documentation that the gift was actually given by that person.

If there are any questions regarding contributions or the acknowledgment of contributions, email CampaignInfo@cota.org.

Guidelines for ‘In Kind’ Gifts

An in-kind gift is any non-monetary item or service donated to a COTA community fundraising campaign.

Examples of an in-kind gift include:

- Items donated for an auction or drawing.
- Printing of fundraising materials.
- Services donated for an event.
- Venue donated for a fundraising event.

Gift-in-kind contributions are tax deductible and can be acknowledged with a COTA **Gift In Kind Donation Form**. This form must be completed and the white original must be sent to COTA.

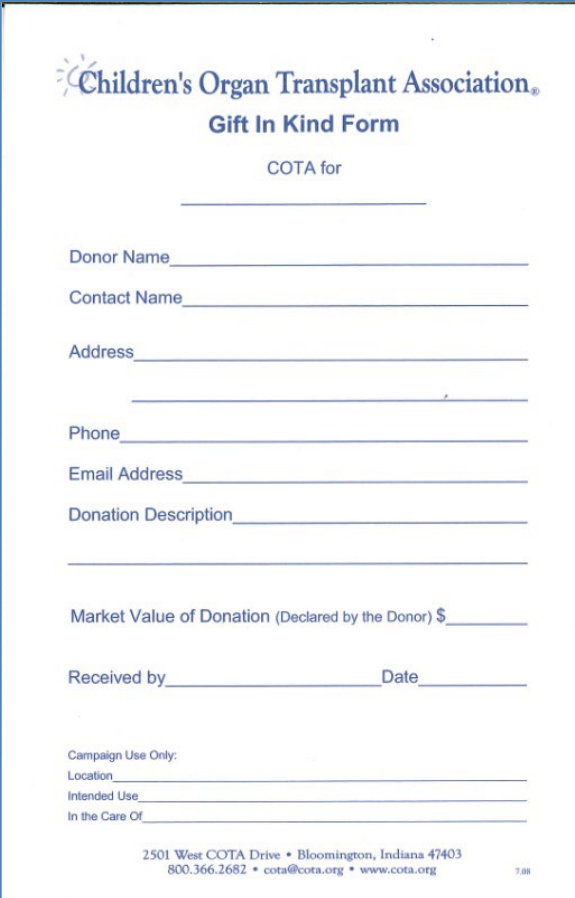
A sample Gift In Kind Form is included in the campaign supply box. Additional copies may be ordered in the [Order Supplies link](#) on the *Volunteers* section of COTA.org.

The **white original** of the Gift In Kind Form should be sent to COTA’s headquarters for contributor acknowledgement. The **yellow copy** of the Gift In Kind Form should be given to the contributor. The last three lines can be used by the volunteer team to track in-kind contributions.

It is the responsibility of the individual making the contribution to report the fair market value to their tax preparer.

Please contact COTA if there are any questions regarding receiving or acknowledging in-kind gifts.

Always remember to have the contributor provide the declared fair market value.



The image shows a sample 'Gift In Kind Form' from the Children's Organ Transplant Association (COTA). The form is titled 'Children's Organ Transplant Association® Gift In Kind Form' and 'COTA for'. It includes fields for Donor Name, Contact Name, Address, Phone, Email Address, and Donation Description. There is a line for Market Value of Donation (Declared by the Donor) \$, and a line for Received by Date. At the bottom, there is a section for Campaign Use Only with fields for Location, Intended Use, and In the Care Of. The footer contains the address 2501 West COTA Drive • Bloomington, Indiana 47403, the phone number 800.366.2682, the email cota@cota.org, the website www.cota.org, and a small number 7.08.

Children's Organ Transplant Association®
Gift In Kind Form
COTA for _____

Donor Name _____
Contact Name _____
Address _____
Phone _____
Email Address _____
Donation Description _____

Market Value of Donation (Declared by the Donor) \$ _____

Received by _____ Date _____

Campaign Use Only:
Location _____
Intended Use _____
In the Care Of _____

2501 West COTA Drive • Bloomington, Indiana 47403
800.366.2682 • cota@cota.org • www.cota.org 7.08

Guidelines for Using the Budget Worksheet

As you plan COTA fundraisers, please remember that finalizing a budget is an important part in the process. To ensure an event provides the greatest benefit possible to your COTA community campaign, you will want to give careful attention to expense and revenue projections. To assist you, COTA provides a Budget Worksheet, which is located in the Community Coordinator and Fundraising Resources links in the *Volunteers* section of COTA.org.

Many COTA community campaign teams have realized they need to adjust their pricing and plans after completing a Budget Worksheet and discovering they could have put in many hours of time and effort only to generate a small return for the COTA fundraising effort. A budget will help ensure your COTA team's fundraising efforts pay off.

If you will be requesting funds to pay expenses, a Budget Worksheet must be submitted to COTA at least four weeks prior to the event. The Budget Worksheet should be completed by all fundraising activity chairs and submitted to the Community Coordinator, who will review it and send to COTA for approval. **If a Budget Worksheet is not on file with COTA, all expense payment requests will be denied.**

Children's Organ Transplant Association					
2501 West COTA Drive • Bloomington, Indiana 47403					
800.366.2682 • CampaignInfo@cota.org					
Budget Worksheet					
COTA for _____					
Event Information					
Name:					
Event Date:					
Event Description:					
Chairperson:					
Phone Number:					
Email Address:					
EXPENSES					
Facility Expenses					
Facility Rental					
Lighting					
Audio/Visual					
Equipment Rental					
Other:					
Event Expenses					
Food		people @		per person	\$0.00
Beverage		people @		per person	\$0.00
Gratuities					
Entertainment					
Music					
Decorations					
Other:					
Security					
Insurance					
Contact the Children's Organ Transplant Association for more information, as we may be able to assist with a Certificate of Insurance.					
Graphics/Printing Expenses					
Invitations					
Program					
Tickets					

Steps in Budgeting for an Activity

- The Community Coordinator should give a copy of the Budget Worksheet to each fundraising activity chair.
- The chair should complete the Budget Worksheet at least one month before the event and submit it to the Community Coordinator. *Larger or more complicated events may require a budget submission eight weeks prior to the activity.*
- The Community Coordinator should review the worksheet to ensure all expenses have been calculated and all guidelines and policies (such as those for holding games of chance and those pertaining to serving alcohol) are being followed. The Community Coordinator should contact COTA with any questions or concerns about policies and guidelines. **COTA does not pay or reimburse for postage expenses or advertising.**
- If the event will require fundraising expenses to be paid from the proceeds, the Community Coordinator must submit a Budget Worksheet to COTA **prior to finalizing plans or paying expenses.** Email the Budget to CampaignInfo@cota.org or fax it to 812.336.8885.

Budget Details

1. All promotional materials, including flyers, brochures and ads, must be approved via CampaignInfo@cota.org prior to printing and distribution. If the activity will have expenses, a Budget Worksheet must be filed and approved by COTA prior to submitting any promotional materials for approval.
2. Many items needed for a COTA fundraising event will be contributed as in-kind gifts to the community campaign. If you are uncertain about these contributions when you complete the budget, include them as an expense. When in-kind contributions are secured there will be even greater proceeds from the event.
3. If the activity budget has expenses of \$5,000 or more from any one vendor, a detailed estimate of expenses from that vendor must accompany the Budget Worksheet.
4. If the proposed expenses for an event are \$10,000 or more, the Budget Worksheet must be submitted and approved by COTA at least *eight weeks* prior to the event.
5. As a general rule, for approval COTA looks to see that income more than doubles expenses on the Budget Worksheet to justify the use of funds raised. **No Budget Worksheet will be approved where the income/proceeds do not offset all of the activity expenses and/or when an open bar or a host bar is offered.**
6. As approved expenses are incurred, COTA will work with the Community Coordinator and activity chair to manage reimbursements, deposits and invoice payments to vendors. All requests for expense payments must be made in writing along with original vendor invoices that have been reviewed by the community campaign for accuracy. **Allow at least 7 business days for processing of payment requests.**
7. Activities sharing profits with another nonprofit group are allowed. However, COTA must receive at least 50% of the activity proceeds. COTA will be responsible for up to the percentage of expenses equal to the percentage of income COTA will receive. A Budget Worksheet must be approved at least eight weeks prior to the event showing all income and expenses, as well as COTA's share of the income and expenses.

A blank, editable Budget Worksheet and samples can be found in the *Volunteers* area of COTA.org. Contact CampaignInfo@cota.org with questions.

Submit Budget to COTA – Email: CampaignInfo@cota.org or Fax: 812.336.8885

Activity Insurance

Occasionally venues used for campaign fundraising events require a Certificate of Insurance from COTA.

Insurance coverage should be requested only when necessary. In most circumstances COTA can help secure this supplementary event insurance at a reasonable cost that will be part of the event's overall budget. Please note the following:

- Insurance is not available for third-party activities.
- COTA cannot provide liability insurance for events serving alcohol.

Activity Insurance Application Process:

1. The Event Chairperson submits a budget worksheet to the Community Coordinator for review.
2. The Event Chairperson visits the venue and discusses contracts and rental guidelines. The venue should notify the chairperson if activity insurance is required. **Note: COTA approval is necessary before signing any contractual agreements or making any deposits to the venue.**
3. If insurance is required by the venue, the Event Chairperson completes the COTA Activity Insurance Application and sends the application and the budget to COTA. Applications must be submitted at least four weeks prior to the event.
4. COTA reviews the application and discusses any issues with the Event Chairperson and/or Community Coordinator.
5. The Certificate of Insurance is sent to the Event Chairperson.

An Activity Insurance Application form is available online in the *Volunteers* area of COTA.org, and also on the next page of this manual. You may copy the form, complete it and submit it one of the following ways:

Email	CampaignInfo@cota.org
Fax	812.336.8885
Mail	COTA, 2501 West COTA Drive, Bloomington, IN 47403

Children's Organ Transplant Association®

The Trusted Leader Supporting Families ... For a Lifetime

COTA Activity Insurance Application

Community Campaign Name _____

Contact Information for the Activity Chairperson

Activity Chairperson Name _____

Address _____

City _____ State _____ Zip _____ County _____

Phone _____ Email Address _____

Information about the Activity

Name of Activity _____

Brief Description of Activity _____

Will alcohol be served or sold? Yes No

Will participants be using a pool or body of water for the activity? Yes No

Date(s) of Activity _____ Start Time _____ End Time _____

Activity Location/Venue Name _____

Venue Address _____

Venue Contact Person _____ Contact Phone _____

Anticipated Attendance _____ Number of Volunteers _____

Please remember:

- Allow 10 business days for application review and processing.
- Certificates will be sent to the Activity Chairperson listed above.
- COTA campaign volunteers must not make a commitment to the venue prior to approval of the activity insurance application. All contracts must be reviewed and signed by COTA.
- The cost of the insurance policy will be considered a fundraising expense, so please list the quote as a line item on a COTA Budget Worksheet.
- Insurance is not available for activities sponsored, hosted or presented by other organizations.

Submit a COTA Activity Insurance Application and a COTA Budget Worksheet via:

- Email to CampaignInfo@cota.org
- Fax to COTA at 812.336.8885
- Mail to COTA, 2501 West COTA Drive, Bloomington, Indiana 47403

2501 West COTA Drive • Bloomington, Indiana 47403

800.366.2682 • COTA.org

COTA Campaign Website

The Children's Organ Transplant Association provides each campaign a no-cost customizable website. To make full use of the website tools, each campaign must have a Website Coordinator. Each site offers a variety of tools to help volunteers maximize their fundraising efforts, as well as provides communications tools to share information about the transplant journey, volunteer opportunities and fundraising activities.

Website Features

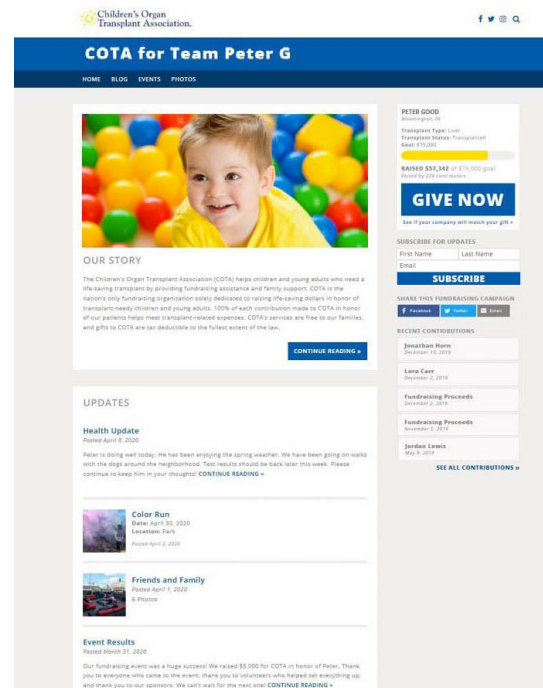
- Unique shortened domain name for the site.
- One click to contribute.
- Blogging tool for updates about the patient's status.
- Events tab for fundraising activity information.
- Photo galleries.
- Subscription feature for notifications of blog, event and photo updates.
- List of recent contributions to the COTA community campaign.
- Links to campaign social media pages.

Timeline and Fees

The COTA campaign website will be available at no cost as long as the family is working with COTA. The unique, shortened domain name will be supplied for a minimum of one year at no charge. On an annual basis, COTA, together with the campaign team and the family, can decide if the domain name needs to be renewed for an additional year.

Community Fundraising Campaign Information and Fundraising on the Web

If a website and/or domain exists that is used for fundraising purposes or updates about a COTA patient, COTA staff will assist you in transitioning your website information to the COTA campaign website.



COTA campaigns and COTA families are not allowed to have any other website while actively fundraising with COTA.

Website Guidelines

The Children's Organ Transplant Association requires COTA community campaigns to utilize only the campaign website provided by COTA. This site supports the activities of the community fundraising campaign and informs campaign volunteers and the public about the patient and fundraising activities.

COTA campaign website services include:

- *Secure Donations* – Contributors can feel confident using COTA's secure donation tool. Contributions can be made using VISA, MasterCard, American Express or Discover. Online contributions are acknowledged and are tax deductible to the fullest extent of the law.
- *Reciprocal Links* – COTA will have a reciprocal link from the COTA website (COTA.org) to each COTA campaign website so anyone accessing either site can seamlessly access the other site.
- *Ongoing Website Support* – COTA will provide ongoing support and resources for every COTA campaign website and Website Coordinator.
- *Website Content Review* – COTA periodically reviews the content of all sites to ensure that messages are consistent with COTA guidelines and IRS requirements. COTA reserves the right to modify content to ensure compliance and contacts Website Coordinators (and, if necessary, the Community Coordinator) to discuss any modifications.

COTA Web Services

Campaigns must have a Website Coordinator to utilize the full COTA campaign website. An ideal candidate would be an individual with some familiarity and experience in template-style websites, such as WordPress, Blogger and Facebook. When a Website Coordinator has been recruited and the lead campaign volunteers have completed the training process:

- COTA will provide website log-in information and a manual for the Website Coordinator.
- COTA will work with the Website Coordinator throughout the campaign.
- The COTA campaign website will be available as long as the family is working with COTA. The shortened, unique domain name will be supplied for a minimum of one year at no charge. On an annual basis, COTA, together with the campaign team and the family, can decide if the domain name needs to be renewed for an additional year.
- COTA retains full oversight and editorial control of all COTA campaign websites.

***Note: If a patient passes away while an active COTA campaign website is in use, the website is available for 90 days and then deactivated. The patient family may decide to shorten or lengthen that timeframe, and COTA staff will work with the family on an adjusted timeline.**

If the Campaign or Patient/Family Already Has a Website

COTA patients and/or immediate family may not maintain any other website during the active COTA campaign to share transplant-related information nor for fundraising. If the family or campaign has a website, the Website Coordinator and/or family must contact COTA with the following information:

- The URL address of the site.
- The name, address, phone number and email of the administrator.
- The date the site was (or will be) deactivated (must be within two weeks of the training meeting). If the site is not deactivated, a posting must be made linking to the COTA campaign website, with a note suspending this site's updates and stating all transplant-related information will be found on the COTA website.
- A previously-used domain name may be redirected to the COTA campaign website. **This option is only available if the previous site was active and has been disabled.**
- The COTA URL must be used on all community campaign materials.

COTA Campaign Website Content Review

COTA will periodically review the content of the site to ensure that messages are consistent with COTA guideline and IRS requirements. COTA will contact your Website Coordinator to discuss any modifications.

- Website Coordinator Responsibility
 - ✓ Regular updates to the campaign website, including adding event/activity dates, times and locations; soliciting gifts and volunteers; and encouraging the use of the site by the family.
 - ✓ Regular audits of the campaign website to ensure appropriate and accurate information in all parts of the site.
- COTA Responsibility and Authority
 - ✓ Regular audit of the campaign website for inconsistent, inaccurate or incomplete information and for spam.
 - ✓ Notification to Website Coordinator when editorial changes need to be made or have been made by COTA staff.

Use of the COTA Campaign Website for Sales of Merchandise and/or Tickets

To help maximize your fundraising effort, and to ensure all federal and state laws and regulations are strictly followed, COTA has established policies and guidelines regarding the use of the COTA campaign website for solicitation of contributions and for sales/promotion of merchandise.

- Campaigns may not use the COTA campaign website to sell merchandise due to tax-related issues and interstate commerce issues. However, t-shirt campaigns or similar fundraisers may be conducted with COTA's approval and assistance. A COTA Event Thermometer is recommended for these fundraisers.
- Campaigns may sell tickets to activities using the COTA campaign website, but only with COTA knowledge, approval and assistance. A COTA Event Thermometer is recommended for ticket sales.
- Campaigns may not have a PayPal or Venmo account linked to the community fundraising campaign, as this requires a bank account and no other bank accounts are allowed during the COTA campaign. If the volunteers would like to establish a PayPal or

Venmo account for a legitimate purpose, they can do it as a third-party activity, which means that COTA and COTA volunteers are not involved. It is important to note that contributors will not be acknowledged if proceeds are received through PayPal or Venmo. COTA is the beneficiary of proceeds only.

Links

Links allowed on the COTA campaign website include:

- Links to newspaper, television and radio coverage of campaign activities.
- Links to third-party sites. See policy below for details.
- Link to the hospital where the patient will be/has been transplanted.
- Links to medical websites for more information about the patient's condition.

Links to other groups not allowed on the COTA campaign website include:

- Links to businesses, churches, community groups, etc.
- Activity sponsor listings can be posted on the COTA campaign website, as well as photos of gift presentations, but no link should be provided to sponsors, etc.

Links from other websites to the COTA campaign website are allowed.

- Other organizations are allowed to establish a link to the COTA campaign website. Churches, businesses, workplaces, clubs and organizations may direct their members and employees to the COTA campaign website.

Third-Party Websites

A community campaign may have an individual or group, but not the campaign, operate and maintain a separate website solely for the purpose of selling merchandise or tickets (but not for any gaming activity including raffles) or for activity participant registration. *(This policy is subject to change, if necessary, based on legal considerations.)*

- Definition of Third-Party Activity
 - ✓ An activity planned and implemented by another party where COTA's involvement in the activity is limited to only accepting proceeds from the activity. COTA and COTA volunteers are not involved in the planning or implementation of the activity. COTA cannot accept or acknowledge any contributions made for or to support the activity.
- Mention of COTA
 - ✓ A third-party website may mention COTA only as the beneficiary of the proceeds of the activity.
- Proceeds from Third-Party Activities
 - ✓ Proceeds are donated to COTA through a check, money order or credit card that comes directly from the third-party event sponsor/organizer. The proceeds must include the campaign name (on the memo space on the check, for example) so the funds can be allocated appropriately.
- Links between the Third-Party Website and the COTA campaign website
 - ✓ A link from the COTA site to the third-party site is allowed. This link must be located under the Events Tab of the COTA campaign website.

- Other Information
 - ✓ COTA is under very precise and strict federal and state statutes concerning fundraising and how descriptions of activities are worded and presented to the public. COTA and the Community Coordinator must be aware of all fundraising activities.
 - ✓ COTA reserves the right to review all Third-Party Websites and, on a case-by-case basis, to ask for modifications and/or to disable the link. Community campaigns will be notified should action be taken, but COTA reserves the right to disable any link in question at any time.

Social Media

The world is well-connected today thanks to social media. Facebook has proven itself to be the predominate method of instantly sharing pictures, messages and other forms of communication, with Instagram and Twitter close behind.

If you plan to incorporate social media platforms into your COTA fundraising effort, the following page has extensive information about posting. Please read through the **COTA Social Media Guidelines** for community campaigns and distribute this information to your volunteer team. It is not only important to follow COTA guidelines, but also to preserve and respect a family's transplant journey.

Any questions you may have about social media and your COTA community campaign should be addressed to CampaignInfo@cota.org.

Other COTA Campaign Website Information

Copyrighted Materials

- Professional photos, sponsor logos and other copyrighted material can be included only with permission from the original source. COTA reserves the right to remove or edit any such material.
- Materials provided by COTA can be used without permission.

For More Information

When the COTA patient or their parents signed the COTA Patient Agreement, they agreed to follow all policies and guidelines. All community campaign volunteers need to abide by the agreement, as well. If you have specific questions or if you need clarification, the COTA team is just a phone call or email away. The COTA staff is happy to assist you with your efforts. Contact COTA at 800.366.2682 or CampaignInfo@cota.org to discuss your website needs.

COTA Social Media Guidelines for Community Campaigns

Please read carefully and regularly share this information with your COTA volunteers.

A key piece of the transplant journey is communication, which includes sharing health updates, success stories, challenges and COTA fundraising opportunities. While email is a great method of directing people to the COTA campaign website, social media may provide optimal benefit and maximum reach. **COTA's Social Media Guidelines** should be read and reviewed by all community campaign volunteers to ensure appropriate social media updates regarding fundraising, event promotion and patient health status.

Why is this so important? Once text or imagery is posted, it cannot be 'unseen.' As a COTA community volunteer, consideration of a patient's/family's wishes must be a priority. Likewise, posting incomplete or ambiguous information may result in questions that take away from COTA fundraising success.

The table below shows some examples to help you understand what social media outreach is appropriate.

What Not To Do	What To Do
Create a social media page (i.e. Facebook, Twitter, Instagram, etc.) that is not regularly monitored, or does not work in partnership with a COTA community campaign website.	Use a social media page to complement a COTA campaign website. Regularly monitor postings and updates for accuracy and IRS compliance. Include links to the COTA campaign website in each post to encourage contributions. Include a link on the About or Bio section of the social media profile to the COTA campaign website, as well.
Post photographs the COTA patient and family would not approve of, or share information the family has not personally generated or approved.	Use pictures that depict truth and emotion, but also those that will be catalysts for contributions. Be sure every post is grammatically correct and factual, and communicates an important message to followers and potential contributors.
Create events or share pictures on social media, but not duplicate the information on the COTA campaign website.	Promote the COTA campaign website as the primary source of information because it also provides COTA donation opportunities. Always remember to pre-approve all event details and promotional pieces through CampaignInfo@cota.org.
Leave the social media page(s) separate from the COTA campaign website.	Link the social media page(s) to the COTA campaign website.
Share COTA campaign fundraising information in a non-compliant manner.	Utilize COTA's Vital Communication and Media Information document to create posts that comply with COTA and IRS guidelines. Send drafts to CampaignInfo@cota.org for approval prior to posting.

COTA shares patient and community campaign stories through its own social media efforts ([Facebook](#), [Twitter](#), [Instagram](#) and [LinkedIn](#)) and ongoing communications with contributors, volunteers and supporters. Be sure to tag COTA in your social media posts that refer to fundraising -- and any other posts as necessary. Use the hashtag **#COTAHope** to allow anyone looking for COTA-related posts to easily find information about your COTA patient and community campaign. Any photographs or information used by COTA community campaigns on social media or COTA websites may also be used in online and printed COTA communications.

Again, please regularly share and reaffirm this information with your volunteers. Before announcements, flyers, and details about fundraising events are published in written form, on the COTA campaign website or on social media, approval is required by emailing the document to CampaignInfo@cota.org. COTA's Social Media Toolkit includes templates for Facebook, Twitter and Instagram posts and can be found in the *Volunteers* area of COTA.org.

COTA Vital Communication and Media Information

Please read carefully and regularly share this information with your COTA volunteers.

As a 501(c)3 nonprofit organization, the Children's Organ Transplant Association (COTA) receives contributions to help offset transplant-related expenses. COTA then disperses funds to families to offset those expenses.

A crucial part of the contribution process is to clearly state who is receiving the gifts and how they will be used. Financial contributors must know their gifts are contributions to COTA and not to the patient/family directly. Contributions to COTA will be used to allocate funds for transplant-related expenses, and are tax deductible to the fullest extent of the law.

Why is this so important? While it is highly motivating to promote helping a local patient's family with expenses, if the family receives money directly it is considered taxable income and the contributor cannot receive a tax deduction. Therefore, the public should not be misled to believe their gifts immediately go to COTA families. It should be clear that transplant families are the beneficiaries of COTA funds, and the community campaign is raising funds that can be used by transplant families as they need them throughout their transplant journeys.

The table below shows some examples to help you understand what wording is appropriate.

Not Allowed	Allowed
A group of volunteers from Nashville, Tennessee, have been working with the Children's Organ Transplant Association (COTA) to raise funds for Jane's transplant-related expenses.	A group of volunteers from Nashville, Tennessee, have been working with the Children's Organ Transplant Association (COTA) to raise funds for transplant-related expenses.
100% of proceeds raised from fundraising go to Johnny and his family to pay transplant-related expenses.	100% of proceeds raised from fundraising will go to COTA to assist with transplant-related expenses.
Fundraising proceeds will benefit Jean in her campaign with COTA.	Fundraising proceeds will benefit COTA in honor of Jean to assist with transplant-related expenses.
Friends and family members of local boy Sam Doe are hosting a bake sale to raise money for his liver transplant. The group is working with the Children's Organ Transplant Association (COTA) to raise funds for the family's expenses.	A bake sale will be held in honor of Sam Doe, a Chicago-area child who needs a liver transplant. Sam's family has asked for assistance from the Children's Organ Transplant Association (COTA). Funds are being raised to assist with transplant-related expenses.
Funds are being raised for COTA for Team Jane for her kidney transplant-related expenses.	Funds are being raised for COTA for Team Jane to assist with transplant-related expenses.

Again, please regularly share and reaffirm this information with your volunteers to make sure there is no question about the path contributions will take. Before announcements, flyers, and details about fundraising events are published, on the COTA campaign website or on social media, approval is required by emailing the document to CampaignInfo@cota.org.

COTA Campaign Information

COTA Campaign Name: _____

COTA Website Link: _____

Campaign Fundraising Goal: _____

Family Contact Information

Parent/Caregiver Name(s): _____

Primary Phone Number(s): _____

Primary Email Address(es): _____

Volunteer Contact Information

Community Coordinator Name: _____

Phone Number: _____ Email Address: _____

Public Relations Coordinator Name: _____

Phone Number: _____ Email Address: _____

Website Coordinator Name: _____

Phone Number: _____ Email Address: _____

Other Volunteer Name: _____

Phone Number: _____ Email Address: _____

Other Volunteer Name: _____

Phone Number: _____ Email Address: _____

COTA Miracle Makers

COTA Miracle Makers are a group of people committed to helping the Children's Organ Transplant Association and COTA patients. COTA works to identify and contact campaign volunteers who are interested in continuing their work with COTA following the community fundraising campaign.

Miracle Makers help COTA and COTA community campaigns through the following ways:

1. Providing resources, advice and support to new COTA community fundraising campaigns in their area.
2. Making presentations about COTA to public groups and transplant patient support groups.
3. Planning and implementing fundraising and awareness activities.

COTA Miracle Makers receive materials and communications to support their activities, and are encouraged to seek out opportunities to talk about COTA programs and the organ and tissue donation process.

Please submit names and contact information for campaign volunteers to COTA following the conclusion of the community fundraising campaign.

Please email **MiracleMakerInfo@cota.org** to learn more about the program and how you can continue to give hope for transplant families.



Ongoing Support ... COTA's Commitment

The Children's Organ Transplant Association is committed to helping families throughout their transplant journey ... before, during and after the transplant. In fact, a COTA patient never 'ages out' of the COTA family after the Patient Agreement is signed.

COTA encourages community campaigns to consider holding an annual fundraising event. No matter what the event may be, this is an opportunity to remind caring people of the family's ongoing transplant-related financial needs and to offer ongoing emotional support. A successful activity held during the campaign may be a place to start when planning a yearly activity. Or a team may choose to celebrate the anniversary of the patient's transplant.

Keep in mind that the community may wonder why funds are still needed. Think of this question as an opportunity to continue to share the family's story. This is an opportunity to ask the community to help by providing a financial cushion for ongoing needs like medications, check-ups, therapy and return trips to the transplant center.

COTA can provide a semi-annual patient statement to the family to keep them informed of the campaign balance and reimbursements. The family may email FamilyServices@cota.org to request the statement.

The campaign volunteers may change in the months following the transplant or in the years following the initial community fundraising campaign. COTA understands that time pressures and other commitments may keep a lead volunteer from making a commitment beyond the initial fundraising. Please contact COTA if there is someone who needs training and more information regarding policies, resources or services.

