Children's Organ Transplant Association®

The Trusted Leader Supporting Families

Community Coordinator Manual

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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 corporation.

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.

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, the Children's Organ Transplant Association 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.

Children's Organ Transplant Association 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 Children's Organ Transplant Association staff works closely with key volunteers in a community to schedule a personalized training for the volunteer group. Additionally, COTA staff members and experienced COTA volunteers 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 with a no-cost website to use for fundraising and for communications. A Children's Organ Transplant Association staff member is available to assist with the establishment and ongoing maintenance of the website. In addition, new tools are added to the site as new technology becomes available.

Ongoing Campaign Support
Ongoing assistance is available to all volunteers. The Children's Organ Transplant Association's professional staff members assist volunteers in planning and implementing community campaign activities and events. Tools and templates are available on the COTA website in a special section devoted to campaign volunteers.

Toll-Free Telephone Service
During regular business hours (8 am to 5 pm EST, Monday through Friday), a Children's Organ Transplant Association staff member will quickly respond to your needs and requests. All requests receive a response within two business days.

The general email for COTA is cota@cota.org.

These services, and many others, are provided by the Children's Organ Transplant Association 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.

Lauren Wilmer **Lauren@cota.org** **Regional Development Manager**
Trains and assists Community Coordinators and supports campaign events and activities.

Kim Carter Parker **Kim@cota.org** **Director of Communications**
Trains and assists campaign Public Relations Coordinators with campaign media and publicity.

Danielle Faczan **Danielle@cota.org** **Campaign Resource Specialist**
Creates resources for fundraising campaign volunteers and assists volunteers throughout the fundraising campaign.

Jenna Hudson **Jenna@cota.org** **Campaign Assistant**
Assists fundraising campaign volunteers throughout the fundraising campaign.

Monica Neuberger **Monica@cota.org** **Campaign Assistant**
Assists Webmasters with campaign websites.

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. He or she is 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 Webmaster to ensure event and activity information is posted on the campaign website.

Webmaster (WM)
The Children's Organ Transplant Association provides every fundraising campaign with a website. The Webmaster customizes the site with patient information and photos, campaign activity and event information, and contribution information. COTA will supply the website at no cost for one year after the start of the COTA fundraising campaign.

Patients will have no other website devoted to fundraising during the COTA community campaign. If another site exists, COTA staff will help families and volunteers transition to the COTA campaign website. After fundraising concludes, the COTA campaign website will be disabled and other websites may be reactivated.

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.

More information for all volunteer roles is provided later in this Community Coordinator Manual.

Steps to Beginning a COTA Community Campaign

STEP 1 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.

STEP 2 COTA establishes a community fundraising campaign after the family identifies a Community Coordinator.

STEP 3 The Community Coordinator recruits lead volunteers, including a Public Relations Coordinator and Webmaster. COTA provides these volunteers with additional information about COTA and their roles.

STEP 4 When all lead volunteers commit to the fundraising campaign and additional volunteers have been recruited, a training meeting is held for all campaign volunteers. Ideally this meeting is held in a private room, usually at a church, library, community center or office conference area. This training is led by a COTA staff member at a location convenient to the campaign volunteers. Following the on-site training, the Public Relations Coordinator and Webmaster receive additional training to cover their specific roles in the campaign and next steps.

Trainings may also be held by conference call, if volunteers are located in multiple locations across the country.

STEP 5 The Community Coordinator organizes the volunteer team and coordinates team meetings following the training meeting. The Community Coordinator organizes and leads a campaign organizational meeting for all interested volunteers in the community. The meeting is a way to ensure the following:

a. The family's financial and emotional needs are clearly explained to the volunteers.
b. The campaign structure and goals are explained.
c. Those present are asked to serve on a committee and to provide information and contacts that will help with the community fundraising campaign.

STEP 6 Under the leadership of the Community Coordinator, volunteers begin the community fundraising campaign under the direction of COTA.

STEP 7 Over the next several months, campaign volunteers raise funds through events and activities held in any community where a group of volunteers has a connection. The Community Coordinator and lead volunteers stay in close communication with COTA throughout the community campaign.

STEP 8 As the community campaign concludes, the Community Coordinator organizes a volunteer celebration activity to recognize the work of the volunteers and to announce the amount the campaign has raised. This is also the time to announce the establishment of an annual COTA activity.

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
The Children's Organ Transplant Association 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, the Children's Organ Transplant Association 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 the transplant-related expenses and that both the recipient and the Children's Organ Transplant Association 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, the Children's Organ Transplant Association will make a challenge 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.)

The Children's Organ Transplant Association will supply a website for the community 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 during this time.

Payment of Expenses
The Children's Organ Transplant Association will pay for transplant-related expenses from the Children's Organ Transplant Association 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 the Children's Organ Transplant Association 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 shall be paid from the Children's Organ Transplant Association Patient Account.

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 the Children's Organ Transplant Association to provide hope for a transplant family in need.

Timeline for a COTA Community Campaign

Community Campaign Training
After the Community Coordinator has received his/her preliminary orientation, and additional volunteers have been recruited, a Children's Organ Transplant Association 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 Established
The Children's Organ Transplant Association establishes a website for the community campaign to be used for fundraising and communications purposes. COTA provides training for the campaign Webmaster and encourages full use of the site. The site is available for one year after the start of fundraising at no cost. **No other website devoted to the patient, fundraising or the COTA campaign may be used during that time**.

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 the Campaign Kick-Off meeting or to a community campaign organizational meeting to learn about the campaign.

Media Announcement
After the Public Relations Coordinator receives a telephone orientation and his or her resources (including a list of media in the area), the Children's Organ Transplant Association 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 Webmaster 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 Webmaster about promoting activities.

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 the Children's Organ Transplant Association.

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 MiracleMakerInfo@cota.org.

Procedure for Getting an Account Balance

Each COTA patient has a Donation Page that will be available as long as the family is working with COTA. On the Donation Page 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 Patient Donation Page

- Every COTA patient receives a Donation Page 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 donation page.
- The Donation Page includes a thermometer that shows current fundraising totals. This should be the primary way COTA community campaigns access current fundraising totals.
- The Donation Page thermometer is updated:
  - Immediately when an online gift is made.
  - Daily with contribution totals from checks and credit card forms 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 email an account update request to CampaignInfo@cota.org. The reply will be emailed within one business day.

The account update will include the following:

1. All checks and credit card gifts sent to and processed by COTA (processing usually takes at least two business days after receipt).
2. All online contributions processed by COTA. It takes up to five business days to process these funds. Account updates include only those online gifts that have been processed.

Contributor Lists

Contributor lists will be available by logging into the Volunteers section of COTA.org. The list will include names, mailing and email addresses of contributors; however, no individual gift amounts will be included on this list. A CSV/Excel file will be available for download. Access to this special log-in is typically provided to the Community Coordinator. More information may be found on Page 22 of this manual.

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 account 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.

Community Campaign Training Meeting

On-Site Training
When your community fundraising campaign has the commitment of three lead volunteers – a Community Coordinator, a Webmaster and a Public Relations Coordinator – and a group of volunteers who have agreed to support the fundraising efforts, a Children's Organ Transplant Association staff member will arrange a time to lead a campaign training meeting. During this meeting, COTA will answer questions and help begin the process of planning and implementing fundraising activities.

Training Location
The Community Coordinator is responsible for securing a space that is centrally located, has adequate parking, is accessible to all those invited and is available at no cost. Ideal locations include a room in a church, an office conference room or a private meeting room in a library. Please arrange to have the space available for no less than three hours.

Signs at the entrance doors and through any corridors are helpful. Be sure to place signs or provide directions noting where volunteers can park, what door to enter and any other important details. Sample signs and sign templates can be found in the Volunteer Meeting Resources folder in the campaign supply box, which will be shipped to the Community Coordinator prior to the training meeting.

COTA recommends that the campaign training meeting not be held in a private residence. If the meeting is scheduled in a restaurant, please make sure the room is private and not in the main dining area. Additionally, clearly indicate on the invitation that food and drink purchases are the responsibility of the individual, not the COTA campaign. Food and beverages should be ordered and consumed before or after the COTA training.

If a telephone training is scheduled, please be sure to be in a quiet area. Access to a computer is helpful but not required. Also, consider using a landline phone for call clarity. If you use a cellular telephone, make sure your phone is fully charged.

Room Set Up
If the training meeting site allows, it is helpful to arrange tables and chairs in a square or U-shape, which allows those attending to more easily hear, and see, the other members of the campaign team and the COTA staff trainer. A room set in classroom style (all chairs in rows facing the front of the room) is also a good option.

The COTA trainer will not need any audiovisual equipment. It is helpful to provide volunteers with an Agenda and copies of other handouts found in the Volunteer Meeting Resources folder in the campaign supply box, a notepad or scratch paper and a pen (provided in the supply box).

Refreshments can be served. An area to the side of the seating area with snacks and beverages is easy for volunteers to access during the training. If a meal is being offered, plan for the meal to conclude prior to the meeting or serve dinner following the meeting. It can be very distracting to have wait staff interruptions during the training meeting.

Do not forget to bring the supply box of materials shipped from the COTA office!

Community Campaign Approval Process

The Children's Organ Transplant Association requires prior notification of campaign fundraising activities. This includes, but is not limited to, the following:

1. All fundraising activities managed by your community campaign team must follow COTA guidelines and policies.
2. Any materials to be printed on COTA campaign letterhead must be approved by COTA prior to printing and distribution.
3. All promotional materials, including flyers, brochures and ads, must be approved by COTA prior to printing and distribution.
4. Any gaming activity, such as raffles or casino nights, must be pre-approved by COTA – and state and local laws must be followed.
5. 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.
6. Once promotional materials are approved, the Webmaster should make every effort to post the information to the COTA campaign website. COTA can assist with this process as well.

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.

Community Campaign Timeline

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.

Where to Look for Volunteers

1. Talk to the patient's family members and close friends. These volunteers are typically the most committed because they have a personal connection with the transplant family. Ask each family member and friend to identify 10 additional contacts they can invite to the Campaign Kick-off meeting. Then ask those contacts for five to 10 more contacts. This expanding circle can significantly increase the number of volunteers working on a COTA community campaign.

2. Talk to your friends and relatives or read the community page of your local newspaper to identify people in the community who have been involved in this type of activity. Prepare a list of top prospects. Ask your lead volunteers if they know anyone on the list. If so, they should contact the prospect. Otherwise, ask a chairperson to call.

3. Identify key organizations in your community that have been active with fundraising activities. Focus on larger employers who may want to do a fundraiser in their own business, but do not overlook smaller businesses or non-profit organizations. Many organizations require their employees to do community service work. You may recruit someone with specific skills or contacts that will help the campaign.

4. Look into recruiting from service organizations in your area. Most communities have service club listings in Chamber of Commerce or Convention and Visitors Bureau materials. Have your committee chairs contact local clubs and ask to make a presentation at an upcoming meeting. Most clubs have a guest speaker at each of their meetings. 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; ask for the club's, and each individual's, financial support, and ask for volunteers and fundraising ideas. It is best if you have something specific to ask a club to do. If you have any upcoming event or volunteer meeting, take along enough printed invitations or flyers to give each attendee.

5. 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 the president explaining the COTA campaign and asking for their help. Again, be specific about what you want the group to do: plan a fundraiser, volunteer for a specific activity, etc.

6. Look for other organizations in your community. Churches, youth groups, hobby clubs and special interest groups may be excellent sources of volunteers. They may actually want to do a fundraiser for the community campaign. Frequently, fishing clubs will host fishing derby fundraisers, car clubs host car show fundraisers, motorcycle or snowmobile clubs host rallies or runs, while firefighter and police groups host Las Vegas nights or dinner fundraisers. Call these groups to find out if they would be willing to plan a fundraiser for the Children's Organ Transplant

Association or earmark funds from an already planned fundraiser for the COTA community campaign.

7. Read your local newspaper. Look for club meetings, events and activities and regular fundraisers held by service organizations. These are additional people who need to be contacted for possible community campaign assistance.

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.

Remember… COTA services are free of charge. No fee or percentage is taken from COTA funds raised in honor of patients.

Community Volunteer Recruitment

In addition to recruiting individuals to serve as volunteers for the COTA community campaign, consider recruiting community groups. COTA may be able to provide contact information for Kiwanis Clubs, American Legion Posts and Optimist Clubs in your area. Consider these steps as you build your volunteer team:

Assess.
This is the first step in determining what groups or community leaders to approach. The challenge here is getting people motivated, interested and committed to raising funds and building awareness for the community fundraising campaign.

1. Ask each of the COTA campaign volunteers to make a list of the clubs, organizations, churches and other community relationships they have. Be sure to ask everyone to include names and phone numbers for their contacts.
2. Ask a volunteer to review the local paper and media outlets for a week or two. Then, compile a list of upcoming or current events and note who is sponsoring them.
3. Check with your local Chamber of Commerce, library and Convention and Visitors' Bureau for a Community Events Calendar. This listing will help you review upcoming festivals and other special events.

Plan and Prepare.
After you gather contacts and ideas, determine how and when to approach your community for support.

1. Divide the list of groups and leaders your team members decides are your best opportunities and assign who will contact each.
2. Put together a packet of information that can be used when meeting or contacting your targeted contacts. Be sure to include:
    - Photo of the COTA patient.
    - Copy of the initial COTA Media Alert.
    - Contact information for the Community Coordinator or Committee Chair.
    - Ideas about how they can help you – free booth space at their festival, proceeds from their upcoming dinner, promotion of activities to their membership and/or use of their membership lists to send solicitations.

Recognize.
With the commitment confirmed, ensure the community group is supported in their efforts. See Page 49 of this manual for ideas on recognizing COTA volunteers.

Community Campaign Guidelines and Procedures

As the Community Coordinator, you will be the key person and leader for the volunteer team. You will also be the team member who is regularly communicating with the COTA patient and immediate family. Remember, above all else, the focus of all efforts is to raise funds for COTA for transplant-related expenses. Your encouragement and communication for the COTA community campaign will result in the community taking action and giving toward the COTA fundraising goal.

Please follow COTA guidelines to help maximize your efforts and to make it easy for people to give.

With the knowledge that sometimes the community campaign will plan an activity where not all expenses will be donated, the Children's Organ Transplant Association has a procedure in place for paying fundraising expenses. However, COTA strongly encourages no-cost fundraising activities and asks that all community campaigns limit expenses related to fundraising.

NO fundraising expenses will be reimbursed if an approved budget is not on file at COTA prior to the fundraising activity. Original receipts or bills documenting expenses are required for reimbursement and must be turned into COTA after the activity.

Ongoing support and encouragement from the team at COTA is always just a phone call or email away. Never hesitate to ask questions.

Guidelines for Cash, Check and Credit Card Donations

Please send all contributions made by check or credit card to the Children's Organ Transplant Association.

- When a contribution is deposited into the local account, we won't be able to provide the contributor with a tax receipt letter.
- Checks should be made out to the Children's Organ Transplant Association or COTA with the name of the patient written in the memo space.
- Credit card gifts should be documented with the credit slips provided to the Community Coordinator. Please complete all the information for each credit card donation and ask the donor to sign the slip. The donor keeps the yellow copy and the white copy is sent to the Children's Organ Transplant Association.
- If a large number of checks and/or credit card receipts are being sent, please send via UPS, Federal Express or registered mail.
- Additional business reply envelopes can be provided to the campaign upon request.

Cash donations should be deposited directly into the local bank account.

- When a contribution is deposited into the local account, we won't be able to provide the contributor with a tax receipt letter.
- If a donor wants a tax letter for a cash gift, they need to make their gift using a cashier's check and send that check to the Children's Organ Transplant Association.
- Do not send cash through the mail!

The Children's Organ Transplant Association provides contributors with a tax receipt letter.

- Tax receipt letters are sent within 10 days of receipt of the donation for donations of $50 or more.
- An organ donor card and a business reply envelope for a future donation accompany the letter.
- We must see the check (or a copy of a check) in order to send a receipt letter.

The Children's Organ Transplant Association provides a list of contributors.

- A list of contributors is sent to all active campaigns each month as long as the campaign is actively fundraising. Only one list is provided for each campaign and is sent to the Campaign Coordinator.
- This list contains only the name and address of the contributor. No donation amounts are given for individual donors.
- This list can be used for thank-you cards, or as a guide to the number of people who have contributed.
- **For account balance information, please email your request to balanceinfo@cota.org. See the guideline for account balances for more information.**

To access the list of contributors, a unique username and password is provided to the Community Coordinator. Once that information is received, the Community Coordinator logs into the Volunteer area of the COTA website. Once there, click on **Community Coordinator**, then **Contributors List**.

Credit Card Form

If you are at an event where wireless internet is not available, or if you have a contributor who does not feel comfortable placing credit card information online*, COTA can provide a community campaign with a Credit Card Form. This form has a duplicate page, so a copy may be provided to the contributor after the form is completed.

Please remember to complete all the information on the form.

A sample Credit Card Form is in the campaign supply box. Additional copies may be requested on the Order Supplies link in the Volunteers are of the COTA website.

Credit Card Form

All information is required. Do not leave any blanks.

COTA for _____

Name _____
As it appears on card

Company _____
If card is a business card

Address _____

_____

Phone _____

Email Address _____
If available

Purchase Description _____

_____

Amount of Purchase $_____

VISA MASTERCARD DISCOVER AMERICAN EXPRESS

Card Number _____

CVV _____

Expiration Date (Month/Year) _____

Signature _____

IMPORTANT REMINDER: All credit card forms must be sent to COTA for processing. Do not process credit cards locally because merchant fees will be deducted from the credit card donation.

*** Please know that COTA utilizes secured websites for online contributions made through COTA community campaign websites.**

Guidelines for Using the Budget Worksheet

How to Use the Budget Worksheet

The budget worksheet should be completed by all fundraising activity chairpersons and submitted to the Community Coordinator.

When to Submit the Budget Worksheet to COTA

The worksheet should be submitted to the Children's Organ Transplant Association in two situations:

- If your campaign is planning a fundraising activity where you expect to raise more than $5000, you must complete a budget worksheet and submit it to COTA at least four weeks prior to the event.
- If your campaign is planning a fundraising activity and you will be requesting funds to pay expenses, a budget worksheet must be submitted to COTA at least four weeks prior to the event. **If a budget worksheet is not on file with the Children's Organ Transplant Association, all expense payment requests will be denied**.

Steps in Budgeting for an Activity

- The budget worksheet is made available to the Community Coordinator. The Coordinator should give a copy to <u>every</u> fundraising activity chairperson.
- The chairperson should complete the budget worksheet at least a month before the event and submit it to the Community Coordinator. Larger or more complicated events require a budget submission eight weeks prior to the activity.
- The Community Coordinator should review the worksheet to ensure that all expenses have been calculated and that all guidelines and policies (such as those for holding raffles and those pertaining to serving alcohol) are being followed. The Community Coordinator should contact COTA with any questions or concerns about policies and guidelines. Note that COTA does <u>not</u> pay or reimburse for postage expenses.
- If the event will require expenses to be paid from the patient account, the Community Coordinator must submit a budget form to COTA to receive expense payment pre-approval from COTA before any final plans are made. The budget form can be emailed or faxed to COTA.
- If COTA staff have any questions about the event, they will contact the Community Coordinator and/or the Event Chairperson.

Budget Details

1. All promotional materials, including flyers, brochures and ads, must be approved 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. Budget Worksheets must be submitted to COTA along with the following support material.
    - 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.
    - 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. No Budget Worksheet will be approved where the admission/registration/ticket sales proceeds do not offset all of the activity expenses and/or when an open bar or a host bar is offered.

3. As approved expenses are incurred, COTA will work with the Community Coordinator and Committee 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 campaign for accuracy. Allow at least 10 business days for processing of payment requests.
4. Activities sharing profits with another non-profit 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.

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

Email	CampaignInfo@cota.org
Fax	812.336.8885

SAMPLE Budget Worksheet

COTA for ____Jane Smith_____

Event Name____A Mud Run for COTA in honor of Jane Smith_____Event Date_____

Event Description___*Include location and other important details*_____

Chairperson_____Phone Number_____Email_____

EXPENSES

Facility Rental	$2,500
Other facility costs	
Lighting	
Audio/Visual	$250
Other	
Food and Beverage	
Food _____people @ $_____ per person	$200
Equipment Rental	
Gratuities	
Entertainment	
Music	$150
Other	
Decorations	$250
Security	
Insurance	$100

(Contact the Children's Organ Transplant Association for more information, as we may be able to cover the event.)

Graphics/Printing	
Invitations/Brochures/Flyers	
Program	
Tickets	
T Shirts	$150
Posters/Signs	$300
Prizes/Plaques/Certificates	
Publicity	
Advertising/Printing	
Other	
Postage (*COTA does not pay for postage*)	
Other Costs	COTA bracelets $50
EXPENSE TOTAL	**$3,950**

Sample Budget Worksheet Cont.

INCOME

Event Ticket/Item Sales	$15,000 300 people @ $50 per person
Food and Beverage	
Food Sales 300 people @ $ 5.00 per person	$,1500
Beverage Sales _____ people @ $_____ per person	Included in food
Sponsorships	$25,000
Decoration Sales	None
Raffle Ticket Sales	None
Auction	
Sales Items	
Program	
T Shirts	50 @ $20.00 = $1,000
Other	
Other Income	
	COTA bracelets 100 @ $2.00 = $200
INCOME TOTAL	**$42,700**

EVENT BUDGET SUMMARY

TOTAL INCOME	$ **42,700**
TOTAL EXPENSES	$ **3,950**
EVENT PROCEEDS	$ **38,750**

PLEASE NOTE: *Excel and Word versions of this Budget Worksheet are available online.*

*** COTA does not pay for postage**. For planning purposes you need to review and note the costs that would be incurred for mailing invitations, solicitation letters, etc. Your committee will need to consider how they will cover postage costs. For example: each volunteer agrees to mail a certain number of pieces at his or her own expense, a business agrees to run the pieces through its postage meter, etc.

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.

For your convenience, please use the **Event Income Summary** form provided by COTA (available in the Volunteers section of COTA.org, and on the following page). This summary includes the name of the participant, the value of the good/service, the amount of the contribution and the total amount paid.

The checks/credit card receipts and In-Kind Donation Form(s) must be sent to the Children's Organ Transplant Association within seven days after every 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 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.

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 acknowledgement 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 proof (copy of a check) that the gift was actually given by that person.

If there are any questions regarding contributions, the acknowledgement of contributions or to request additional Event Income Summary forms, please go to the Volunteers area of COTA.org or email CampaignInfo@cota.org.

Event Income Summary

Children's Organ Transplant Association®

2501 West COTA Drive · Bloomington, Indiana 47403
800.366.2682 · COTA.org · cota@cota.org

COTA for

_____

Event Name_____

Event Date_____

Event Location_____

Event Chair Name_____

Event Chair Phone_____ Email_____

Event Proceeds $_____

Contributor Name	Payment Type Cash, Check or Credit Card	Value of Goods/Services Received	Campaign Donation	Total Amount Paid
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$
		$	$	$

*COTA gift acknowledgement letters will be provided for check or credit card donations of $75 or more.

Guidelines for "In Kind" Contributions

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, drawing or raffle.
- Printing of fundraising materials.
- Services donated for an event.
- Venue donated for a fundraising event.

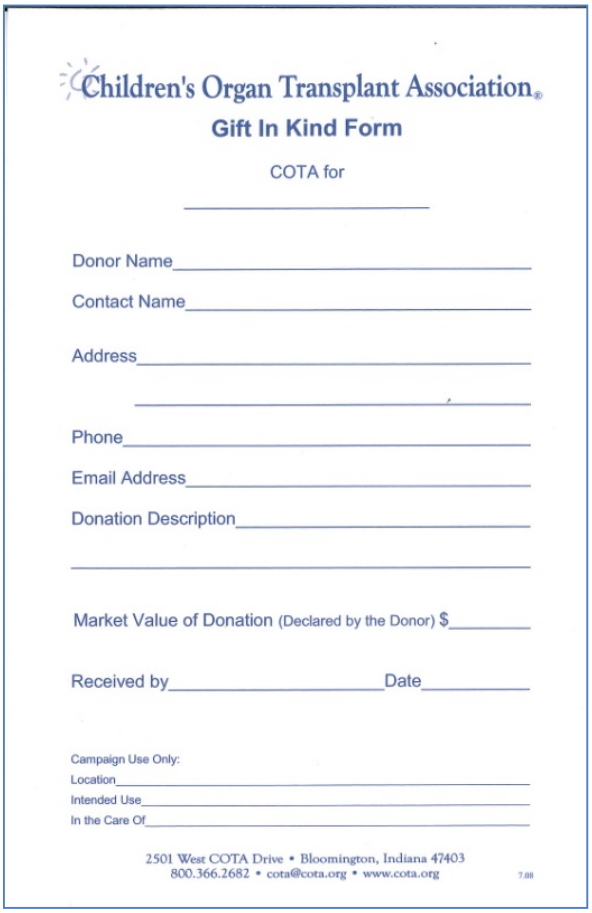
Gift-in-kind contributions are tax deductible and can be acknowledged with a receipt letter from the Children's Organ Transplant Association. A **Gift In Kind Donation Form** must be completed and the white original must be sent to COTA.

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 the COTA website.

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 of the form are for COTA in-office use only.

It is the responsibility of the individual making the contribution to report the value to his or her tax preparer.

Please contact COTA at 800.366.2682 or via email at CampaignInfo@cota.org if there are any questions regarding in-kind gifts or the receipting of in-kind gifts.



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

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

Fundraising Guidelines and Policies

Rarely is there one single fundraising event/activity that will meet the community campaign's fundraising goal. The following pages explain how to utilize multiple fundraising sources and explain the guidelines to follow in soliciting contributions.

In addition, COTA policies regarding alcohol, use of letterhead and contracts are included in this section.

"…we were so impressed that 100% of the funds raised would be available for transplant-related expenses and we liked the fact that those who donated received a tax deduction."
Comment from a COTA Family

Guidelines for Auctions

Before planning an auction, please review these guidelines:

1. Any auction planning must be communicated to COTA before event plans are finalized.

2. The IRS requires that a charitable gift receipt be provided to contributors for gifts of $250 or more. As a matter of policy, the Children's Organ Transplant Association provides a charitable gift receipt letter for all donated items with a value of more than $75.

3. For the purchase of an item at a charitable auction, the charitable gift value is the amount paid by the purchasing party that is **greater than** the 'Fair Market Value' of the item purchased.

4. For the purchase of an item where the amount paid by the purchasing party is **less than** the 'Fair Market Value' of the item purchased, there is no charitable gift value to the purchaser.

5. In the case of a donated item that is used or reconditioned, the 'Fair Market Value' is determined by a third-party source such as the *Kelly Blue Book* for vehicles or an independent professional appraiser. It is the responsibility of the contributor to determine and substantiate 'Fair Market Value.'

The checks/credit card receipts from the event must be sent to the Children's Organ Transplant Association immediately after the event. COTA asks that all proceeds and receipts be postmarked within seven days of the event. This ensures that contributors receive their tax receipt letters in an appropriate timeframe of the fundraiser.

Please 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.

If you have any questions, please contact the Children's Organ Transplant Association at CampaignInfo@cota.org or 800.366.2682.

Guidelines for Raffles and Gaming Activities

Call COTA before planning ANY raffle or game of chance (like a casino night) to discuss rules and gaming laws.

Note: Auctions are not games of chance and do not fall under these guidelines.

- Before planning a raffle or game of chance, contact COTA for an event planning discussion.
- COTA community campaigns must follow all state/municipality/local gaming laws. In some locations, raffles or other gaming activities may not be used as a fundraising tool.
- No tickets or chances may be sold online or over the internet.
- The activity can be mentioned on the COTA campaign website, but only with the information about the activity with contact name(s) and/or locations of where to purchase tickets.
- There is no charitable gift value or receipt provided for the purchase of a raffle ticket or charitable lottery ticket.
- Another organization may have a gaming activity or raffle on behalf of the community campaign. In this case, COTA can be the beneficiary only and COTA volunteers should not be involved in the planning or promotion of the activity.
- If requesting payment of expenses, a completed budget form must be on file at COTA at least four weeks prior to the event. If there is not an approved budget on file, no expenses can be paid.
- Donated raffle prizes are the key to the success of the raffle. If prizes must be purchased, or if the prize is a cash prize (a 50/50 raffle), you must first discuss this with COTA.

Ticket Design and Sales

Raffle tickets should usually be printed with following information:

Children's Organ Transplant Association

Date/Time/Location of Drawing * Ticket Price or Suggested Donation * Top Prize(s)

License Number *(When issued by the municipality where the drawing is held.)*

- Tickets must be consecutively numbered. This usually requires tickets to be printed by a printer.
- You are required to track how many tickets are printed, how many tickets are sold and the total ticket sale income. Please send this information to COTA within seven days of the drawing. If you will be requesting payment of expenses, a budget form must be on file at COTA prior to the sale of tickets. Some states require further reporting, and COTA will assist you with this.
- Ticket price should be in the $1-5 range. Even for a large, valuable item, do not price tickets too high. It is difficult to sell a raffle ticket for more than five dollars.
- All proceeds from ticket sales must be sent to COTA headquarters (if payment was made by check or credit card) within seven days of the drawing. Checks should be made payable to COTA with the patient name and the word ‘raffle’ in the memo space. Any cash proceeds should be consolidated into a money order and included with the mailing.
- **Raffles cannot be held without COTA’s prior approval.**
- **Local rules and regulations supersede information provided in this manual.**

Guidelines for Third-Party Fundraising

If your COTA campaign will be the beneficiary of the proceeds from an event or activity conducted by another group, business or organization, please follow these guidelines:

Activity Promotion

1. The Children's Organ Transplant Association name cannot be used in the activity promotion. However, the activity sponsor may mention COTA as the beneficiary of the proceeds if the organizers use one of the following options:
    - Proceeds from this event will go to COTA in honor of *Name of Patient*.
    - Your ticket purchase helps support Children's Organ Transplant Association patients like *Name of Patient*.
    - The *Name of Event* will benefit the Children's Organ Transplant Association.
2. Contact CampaignInfo@cota.org before using COTA campaign supplies and other COTA resources for third-party activities.
3. The campaign should not provide the activity organizer with any COTA contributor information.
4. The COTA campaign website may include a link to the organizer's site. The COTA campaign website can mention that the campaign will be the recipient of the funds from an event and include the date, sponsor and basic information. The COTA campaign website may also be used to thank the third-party activity organizer for the gift.

Activity Logistics

1. COTA will not pay any costs or be responsible for any liabilities associated with a third-party event.
    - If licenses or insurance is required for the event, it is the responsibility of the organizer to pay for and obtain the necessary documents.
    - All expenses of the event or activity are the responsibility of the organizers.
2. All proceeds should be sent to the Children's Organ Transplant Association and should include the patient's name on the memo line or noted in correspondence sent to COTA with the donation.
3. Third-party activity organizers can access materials and information by contacting MiracleMakerInfo@cota.org.

Acknowledgement of Donations

1. The event organizer is responsible for knowing general IRS rules and regulations.
2. COTA cannot acknowledge any in-kind gifts as they were solicited, received and used by the organizer and not by COTA.
3. COTA will acknowledge gifts of $75 or more that are made payable to COTA, sent to COTA headquarters and include the contact information of the contributor.

Guidelines for the COTA Challenge Grant Program

The Children's Organ Transplant Association provides a challenge 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 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 when they begin a fundraising drive.

Challenge Grant Program Levels
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.

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

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 an event planning worksheet and budget 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 Page 37 of this manual.

You may copy the form on Page 37, 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

COTA Activity Insurance Application Form

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 Form 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

FOR OFFICE USE ONLY: Rec'd:_____ Approval:_____ Staff:_____ Requested:_____ Sent:_____

2501 West COTA Drive • Bloomington, Indiana 47403

800.366.2682 • COTA.org

COTA Policies

The Children's Organ Transplant Association 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.

Make photocopies of letterhead sent in the Community Coordinator's materials, or 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.

Printed Material Policy
All materials printed for campaign activities, including press releases, brochures, posters, flyers, etc., must be approved by COTA prior to printing and distribution. Usually edits are 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 mail, email or fax.

Raffle and Gaming Policy
Call COTA before planning ANY raffle 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, raffles or other gaming activities may not be used as a fundraising tool. Please refer to Page 33 of this manual for COTA's policies on raffles.

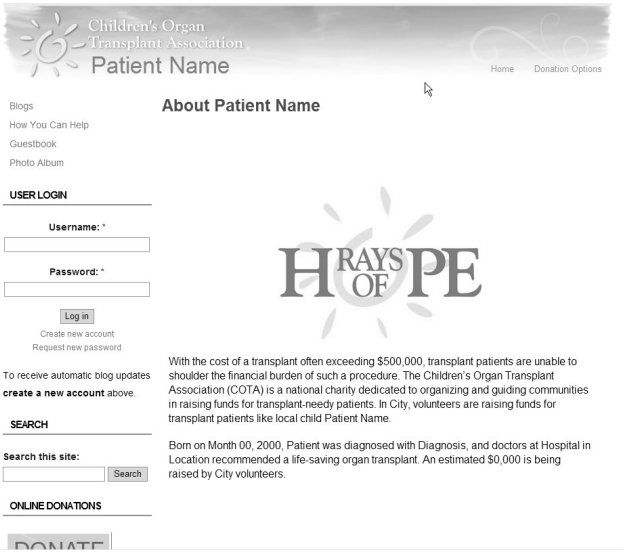
COTA Website Program

To make full use of the website tools, each campaign must have a Webmaster. COTA will train the Webmaster to use all of the website tools.

The Children's Organ Transplant Association offers each campaign a customizable website. 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 domain name for the site.
- One click to Donation Page.
- Journaling tool for updates about the patient's status.
- Pages for fundraising activity information.
- Event pages where participants may register for fundraising events.
- Photo album.



Timeline and Fees

The COTA campaign website will be available 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 website needs to be renewed for an additional year.

Patient Donation Page

In addition to the campaign website, COTA provides each COTA patient with a Donation Page. This page is the portal for online contributions in honor of that patient. The patient Donation Page is available as long as the family is working with COTA.

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 during the time the COTA campaign website is active, due to IRS guidelines.

Website Guidelines

The Children's Organ Transplant Association requires COTA community fundraising 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 do a reciprocal link from the COTA website to each COTA campaign website so anyone accessing either site can seamlessly access the other site.
- *Ongoing Webmaster Support* – COTA will provide ongoing support and resources for every COTA Campaign website and Webmaster.
- *Website Content Review* – COTA periodically reviews the content of all sites to ensure that messages are consistent with COTA guidelines. COTA contacts Webmasters (and, if necessary, the Community Coordinator) to discuss any modifications.

COTA Web Services

Campaigns must have a Campaign Webmaster 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 Webmaster has been recruited and the lead campaign volunteers have completed the training process:

- The COTA campaign website will be made available with all current website features.
- COTA will provide training and a manual for the Webmaster.
- COTA will work with the Webmaster throughout the campaign.
- The campaign website will be available 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 website needs to be renewed for an additional year.
- COTA retains full oversight and editorial control of all COTA campaign websites.

COTA Campaign Website Timeline

- COTA provides a COTA campaign website at no cost for up to one year after the training date.
- After the first year, COTA staff and the patient family may decide to continue the website. The COTA campaign website may remain active for an additional year based on the status of the patient and fundraising.
- If a patient passes away while an active COTA campaign website is in use, the website is available for three months. A PDF version may be provided by COTA.
- The family and Webmaster are notified when the site is nearing expiration. At the family's request, a PDF copy of the website may be made available.

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, theWebmaster and/or family must contact COTA with the following information:

- The address of the site.
- The name, address, phone number and email of the adminstrator.
- 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 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 (typically *www.COTAforFirstNameLastInitial.com*) 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's guidelines. COTA will contact your Webmaster to discuss any modifications.

- Webmaster 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 and volunteers.
  - ✓ 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 Webmaster 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

- 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.
- Campaigns may be able to sell tickets to activities using the COTA campaign website, but only with COTA knowledge, approval and assistance.
- Campaigns may not have a PayPal account linked to the community fundraising campaign, as this requires a bank account and no other bank accounts are allowed during the COTA campaign.

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.
- Link to one medical website 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 accepting proceeds from the activity. COTA and COTA volunteers are not involved in the planning, implementation or promotion 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. Please see Page 34 of this manual for more details on third-party events.
- 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 Activities Tab of the COTA campaign website.
- Other Information
  - ✓ COTA is under very precise and strict federal and state statutes concerning fundraising and how description 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.

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.

Facebook and 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.

If you plan to incorporate Facebook or other 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.

COTA Patient Donation Page

- Every COTA patient receives a Donation Page from which contributors can make gifts in honor of that patient.
- The Donation Page is available as long as the family is working with COTA.
- Gifts can be made in honor or in memory of a patient from the COTA donation page. Contributors may always enter a patient's name when making a gift.
- The Donation Page includes a thermometer that shows current fundraising totals. This should be the primary way campaigns access current fundraising totals.
- The Donation Page thermometer is updated:
    - Immediately when an online gift is made.
    - Daily with contribution totals from checks and credit card forms mailed to the COTA office.

For More Information

Contact COTA at 800.366.2682 or WebInfo@cota.org to discuss your website needs.

Children's Organ Transplant Association®

The Trusted Leader Supporting Families

COTA Social Media Guidelines for Community Campaigns

PLEASE READ CAREFULLY AND COMMUNICATE THIS INFORMATION WITH YOUR VOLUNTEERS.

A key piece of the transplant journey is communication, which includes sharing health updates, success stories, challenges and COTA fundraising opportunities. Tablet computers, smart phones and wireless internet all simplify information sharing. While email is a great method of directing people to a COTA donation webpage or community campaign website, social media may provide optimal benefit and maximum outreach. COTA's Social Media Guidelines should be read and reviewed by all community campaign volunteers to maintain appropriate social media updates regarding fundraising, event promotion and patient health status.

Why is this so important? Emotions can run high during a transplant journey. Once a Facebook entry or image 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 fundraising success.

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

Not To Do	To Do
Create a Facebook page that is not regularly monitored, or does not work in partnership with a COTA community campaign website or COTA donation page.	Use a Facebook page to complement a COTA website or donation page. Regularly monitor postings and updates for accuracy, and include links to the COTA website to encourage donations. Include a link on the About section of the Facebook page to the COTA community campaign website or donation page.
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 Facebook and not duplicate the information on the COTA community campaign website.	Promote the COTA community 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 Facebook page separate from a COTA community campaign website.	Link the Facebook information feed to the COTA community campaign website. For assistance, contact **WebInfo@cota.org**.

COTA shares patient and community campaign stories through its own social media efforts 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. COTA will make every effort to communicate its intention of sharing photographs and patient updates with families and community campaign coordinators.

Again, please regularly communicate and reaffirm COTA's Social Media Guidelines with your volunteers. Before announcements, flyers and details about fundraising events are published in written form, on the COTA community campaign website or in social media, approval is required by emailing the final document to **CampaignInfo@cota.org**.

2501 West COTA Drive · Bloomington, Indiana 47403
800.366.2682 · COTA.org

Email and Campaign Website Solicitation Guideline

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.

When the COTA patient or his/her 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.

COTA does not allow PayPal accounts. COTA cannot set up a PayPal account because it needs to be attached to a bank account. COTA cannot do this with the local account or with any other COTA account. If the volunteers would like to establish a PayPal 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. COTA is the beneficiary of proceeds only.

COTA does not allow online sales of merchandise or other items using the COTA campaign website. The only circumstance in which COTA allows online sales using any website is if the organization providing the website is in the business of online/ecommerce, and then only if the service fees are waived or reduced. (This is a fundraising expense that must be approved using the COTA budget process). Due to sales tax issues, IRS regulations and oversight issues, COTA cannot allow COTA campaign websites to be used for merchandise sales.

COTA does allow activity registration or sale of event tickets using the COTA event pages. With COTA knowledge, approval and assistance, COTA campaign event tickets may be sold using the campaign website. Please contact WebInfo@cota.org as soon as possible in your planning process to get more information about this option.

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.

Ideas for an Annual COTA Activity

Many of the resources needed to help implement these ideas below can be found as templates in the Community Volunteers area of the Children's Organ Transplant Association website, COTA.org.

- ***Balloon Launch***
  Enlist the support of your park district or school field area and hold a community balloon launch. You may consider balloons with note cards attached on which purchasers can write their messages of hope, encouragement and celebration. This can also be a great educational opportunity if you launch green and white balloons and remind attendees that it is to build organ donation awareness.

- ***Dinner and Auction***
  Duplicate a popular menu offering or venue you used during the COTA community campaign and host another similar event. As a twist, solicit auction items that have 'celebration themes' from party supplies to spa get-a-ways. Follow through with this theme with festive décor and New Year's Eve type noisemakers.

- ***Athletic Event***
  Get your community physically involved in a golf tournament, bike ride, fun or competitive run/walk or bowling event. If applicable, pick a type of activity the patient, now post-transplant, is able to participate in … possibly one he or she could not join in before. In the case of a very young patient this may be a Wagon Pull around the community park, or for a teen patient, a soccer tournament. Generate revenue by charging individual or team entry fees or by making the event an 'A-Thon' so all participants collect pledges prior to the event.

- ***Re-Birthday Party***
  Serve cake and ice cream while your COTA patient blows out one more candle on the cake. Issue party invitations that request in lieu of pretty, wrapped packages you will have a 'gift box' to make gifts to the COTA family.

- ***A Non-Event Event***
  In this case, DO NOT throw a party. Instead, send invitations sharing your patient's transplant story and asking for contributions in the amount of what the invitee would have spent on dinner, auction bidding, drinks, a gift for the honoree and perhaps childcare for the evening out. You may also wish to offer contribution amount suggestions, such as $100 for 100 hugs given in the last year; $75 in honor of the 75 days spent at home versus the hospital this past year, or $25 representing the meal the family did not have to eat in the hospital cafeteria. Find numbers that relate to the COTA patient, and make it easy for any age to contribute.

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.

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 the organ and tissue donation process and 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.

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 Webmaster 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, 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.

"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's Top 10 Fundraisers

As you plan fundraising activities for COTA in honor of your transplant patient, you likely will have many ideas. To help you in your efforts, COTA has assembled a list of Top 10 fundraisers. Remember, any COTA community campaign fundraising activity is most successful when a group of volunteers works together as a team to implement an idea about which they are really excited. One person cannot plan and lead most successful fundraisers, but one person can get the ball rolling.

10 **Community Involvement**
Community groups exist to be philanthropic. Capitalize on the missions of organizations by inviting them to partner with your COTA community campaign. These groups are looking for ways to help in your community – provide them with information about your COTA family and ways in which they can get involved.

9 **COTA *Bowling for Life***
Family-friendly fundraising events can be an important component of your COTA community campaign's strategy. Consider COTA *Bowling for Life*, which has been a popular activity for many COTA community campaigns.

8 **Bake Sales, Lemonade Stands, Car Washes and Rummage Sales**
In some cases, simpler is better. Try holding one of these classic community fundraisers, which are proven activities that raise funds with minimal expense and planning time. Gather your supplies, which include volunteers. Then pick and confirm a date, time and location. Finally, promote, promote, promote. These events also provide great opportunities to involve students in your COTA fundraising activities.

7 **Coin Collections**
Pennies, nickels and dimes do add up!
To help 'find' those coins, COTA provides each community campaign with coin canisters in almost any quantity at no cost.

6 **Restaurant and Retail Partnerships**
Businesses, big and small, look for ways to show employees and customers that the company cares about the community.

5 **Games of Chance and Auctions**
Gaming is an activity that requires payment to play and winning involves chance. *Auctions* involve competitive bidding among individuals, but only the highest bidder pays for his or her purchase.

4 **Contributor Challenges**
Engage your social network in a friendly competition to raise funds in honor of your COTA patient.

3 **COTA *Golf for Life***
Planning and hosting a golf outing can be exhausting, time consuming and somewhat risky because golf outings require a fair number of committed volunteers as well as fair weather. However, the results can be outstanding. In fact, golf outings remain one of the most popular special event fundraisers.

2 **A-Thons**
An ‘A-Thon’ event (Walk-a-thon, Bike-a-thon, Dance-a-thon, etc.) can involve large groups of people in an activity that is both fun and profitable. It usually costs nothing to join the fun because event participants ask their friends, neighbors, and colleagues to contribute pledges that ‘pay’ for their participation.

1 **Viral Fundraising**
The Internet and social media allow instant and easy-to-transmit communication. You can harness the power of the Internet to share the transplant story and increase support for your COTA community campaign.

COTA … For Life

COTA has three, all-in-one fundraising events available for community campaigns. COTA Bowling for Life, COTA Golf for Life and COTA Football for Life have a variety of event planning suggestions that an active group of volunteers can organize. To learn more about these events, please visit the Volunteers page at COTA.org and download the files. Be sure to communicate your plans with COTA. COTA’s team of professionals wants to help your volunteer team be successful in any and every way possible.

Event Planning

It is important to have a written plan for each COTA fundraising event. Before any event chairperson begins organizing an event, he or she should submit an event plan and, if appropriate, a budget to the Community Coordinator for review. If the activity has expenses that will need to be paid from the proceeds, or if the activity will raise more than $5,000, the Community Coordinator must forward the budget form to COTA. **Budget forms should be submitted to COTA at least one month prior to the event for final approval and before any money is spent.**

The event plan should include a description of the event, a list of committee chairs and potential volunteers, and a budget. It is important that the plan be as detailed as possible.

From the plan, the event chairperson should create a task list and a timeline. This will help the committee chairs to make their plans and begin recruiting their volunteers.

All event committee task lists should include:

- Who will be working on what?
- What will each committee person be responsible for?
- When will each person need to complete his or her part of the plan?
- Where will each function be performed (before, during or after the activity) This will ensure you have volunteers in both the planning stage and the event management stage.

Early in your event planning process is also the time to begin soliciting in-kind contributions. Make a list of items you will need. At your first volunteer meeting, distribute a copy of this list. Your volunteers may have connections that will help to get your effort started.

Provide your volunteers with copies of COTA's Gift-In-Kind Forms *(see page 30 of this manual to review how to use this form)* and a copy of COTA's IRS Determination Letter (available electronically in the Volunteers section of COTA.org) to help them solicit and document in-kind gifts.

Ongoing support from the team at the Children's Organ Transplant Association is always just a phone call or email away. Please do not hesitate to ask questions.

COTA Event Webpages

Occasionally a COTA community campaign asks for a fundraising website that can track contributions specific to an event. For example, if a 5k walk/run is held, and a campaign wishes to track contributions related to the event, COTA can assist with an event webpage. These pages are created by COTA staff, and are available with the following provisions:

- All marketing materials must be approved by COTA.
- A budget worksheet must be submitted and approved, if fundraising expenses will be incurred.
- The event must fully comply with COTA guidelines.

The event webpage tracks contributions separate from individual COTA community campaign fundraising. Once an event is completed, the funds raised on the event webpage will be transferred and added to the COTA community campaign donation page.

Typically COTA needs three business days to create and activate an event webpage.

If you are interested in having an event webpage, please contact CampaignInfo@cota.org for more information.

Children's Organ Transplant Association

Event Worksheet

Name of the Event

Description of the Event

Proposed Date of the Event

Location of the Event

Number of Participants

Number of Spectators

Publicity Needed

Committee Chairs (list committees and, if recruited, who are committee chairs)

Volunteers (number needed and tentative schedule)

Expenses

Income

Proposed Profit from Event

Sample Event Timeline

Event Manpower

Date to Complete	*Task*	*Person(s)*
	Research and approach event chairperson	
	Determine number of volunteers needed	
	Recruit volunteers	
	Form committees	
	Begin regular committee meetings	
	Meet with committee chairs to review plans	
	Hold a walk through with committee chairs	
	Meet with venue/contractors to finalize arrangements	

Event Logistics

Date to Complete	*Task*	*Person(s)*
	Visit possible venues	
	Check proposed date for conflicts	
	Get cost estimates for location, food, printing, etc.	
	Get bids for music, decorations, printing, etc.	
	Draft and submit budget to COTA for approval	
	Compile mailing list for invitations/brochures	
	Get written contracts from vendors	
	Develop alternative plans (bad weather, etc.)	
	List items for possible donations	
	List potential contributors for items needed for event	
	Investigate need for permits, licenses, insurance	
	Sign any contracts (with COTA approval)	
	Complete mailing lists for invitations/brochures	
	Solicit contributors and sponsors	
	Set menus	
	Finalize audio/visual equipment needs	
	Select and order trophies/awards	
	Confirm sponsors and donations	
	Secure permits, insurance, etc.	
	Review signage needs for event	
	Review budget and task sheets	
	Start phone follow-up calls for contributions and sponsors	
	Assign seats/tables/holes/courts	
	Give estimate to caterers/food and beverage chair	
	Confirm security needs	
	Schedule deliveries of rental items	
	Confirm set up time with volunteers and site coordinator	
	Confirm decoration plans	
	Get revised food and beverage numbers	

Event Publicity

Date to Complete	*Task*	*Person(s)*
	Develop press release announcing event	
	Get the event on community calendars	
	Get brochure/invitation designed	
	Prepare final copy for posters, ads, tickets, etc.	
	Get all pieces approved at CampaignInfo@cota.org	
	Order invitations/brochures, tickets, signs, etc.	
	Mail invitations/brochures	
	Distribute posters	
	Confirm media participation	
	Release press announcements	
	Place advertising (if part of a COTA approved budget)	
	Sell tickets	

ONE WEEK BEFORE THE EVENT

Date to Complete	*Task*	*Person(s)*
	Meet with all committees	
	Finish ticket sales	
	Confirm numbers of participants	
	Finish seating/table/hole/etc. assignments	
	Finalize registration procedures and give to volunteers	
	Double check delivery times and dates	
	Reconfirm event site, rooms, transportation, supplies	
	Make follow up calls to the media	
	Distribute flyers and posters	
	Hold final walk through at site	
	Make final volunteer assignments and give to each volunteer	

EVENT DAY

Date to Complete	*Task*	*Person(s)*
	Arrive early	
	Unpack equipment and supplies	
	Assign volunteers as they arrive	
	Check with committee chairs that all bases are covered	
	Check sound/lighting/etc. equipment	
	Set up registration area and train registration volunteers	
	Go over details with food and beverage chair	
	Make final calls to the media	

Children's Organ Transplant Association®

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VITAL COMMUNICATION AND MEDIA INFORMATION

PLEASE READ CAREFULLY AND REGULARLY COMMUNICATE THIS INFORMATION WITH YOUR COTA VOLUNTEERS!

As a 501(c)3 not-for-profit 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 reimburse 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 journey.

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 for children like Jane.
100% of the proceeds raised from fundraising go to Johnny and his family to pay transplant-related expenses.	100% of the proceeds raised from fundraising will go to COTA to assist families like Johnny's 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 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. Funds are being raised to assist with transplant-related expenses.

Again, please regularly communicate and reaffirm this information to your volunteers to make sure there is no question about the path the contributions will take. Before announcements, flyers, and details about fundraising events are published in written form, on the patient's COTA website or in social media, approval is required by emailing the final document to **CampaignInfo@cota.org**.

2501 West COTA Drive * Bloomington, Indiana 47403

800.366.2682 * COTA.org

Patient Biography

Patient Name_____

Nickname _____ Age_____ Birthdate_____

School Grade_____ School Name/Location_____

Extracurricular Activities/Interests_____

_____

_____

Clubs/Organization/Church/Sports Team Involvement_____

_____

_____

Other Patient Information_____

_____

_____

Favorite Things_____

_____

_____

Family Contact Information

Parent Name(s)_____

Phone Numbers Home_____ Cell_____

Email _____

Permanent Address_____

Address at Transplant_____

Sibling Name(s) and Age(s)_____

_____

Grandparent Name(s) and Location(s)_____

_____

_____

Hospital and Transplant Information

Diagnosis_____

Symptoms of Underlying Cause for the Transplant_____

_____

_____

Prognosis_____

Proposed Treatment_____

Date of Diagnosis_____ Type of Transplant_____

Listed on transplant waiting list? _____yes _____no

Already transplanted? _____yes _____no Date of transplant_____

Transplant Center_____

City_____ State_____

Estimated Cost of Treatment_____

COTA Community Campaign Information

Your Community Campaign Goal $_____

Start Date of Campaign_____

Campaign Website Address_____

Funds to be Used for the Following Transplant-Related Expenses (check all that apply):

_____Lodging/Food at Transplant Center

_____Transportation to Transplant Center

_____CoPays/Deductibles/Premiums

_____Household Expenses while at Transplant

_____Post-Transplant Expenses

_____Hospital Expenses

_____Medications

_____Donor Search/Expenses

_____Other – Specify_____

Your COTA Community Campaign Goal is an estimate of the need through a transplant and at least two years of post-transplant follow up.

The Goal is not a measure of your fundraising success, but is a way to communicate what a transplant family's general financial needs are to the community who will be supporting your efforts.

100% of all funds raised are used for transplant-related expenses.

Public Relations Coordinator Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Webmaster Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Other Key Volunteer Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Other Key Volunteer Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Other Key Volunteer Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Other Key Volunteer Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____

Other Key Volunteer Contact Information

Name_____

Address_____

Phone Numbers Home_____ Cell_____ Work_____

Email _____