



HOSPICE FOUNDATION

Supporting Your Nonprofit End-of-Life Care Provider

Trustbridge Hospice Foundation Third Party Fundraising Policies and Application

Trustbridge Hospice Foundation is grateful to all those businesses, organizations and/or individuals who seek to conduct a third party event in support of our mission.

Protecting our Foundation's hard earned reputation by being associated with quality third party events is more important than the incremental funds raised by those events. With this in mind, the undersigned agrees to the following when conducting third party events to benefit Trustbridge Hospice Foundation. No such event can be held without the prior written approval of our Foundation.

Name/Title of Event: _____

Organizer Information _____

Name of Contact: _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Describe your relationship to Trustbridge and our Foundation: _____

List of members of the planning committee: _____

Event Information

Date: _____ Time: _____

Location: _____

Briefly describe the event: _____

Third Party Event Application

What is the cost to participate or attend? _____

How will the funds be raised? _____

What % of the funds will the Foundation receive? _____

Will any other organizations receive proceeds from this event? YES NO
If yes, who? _____

Is there a sponsoring organization? YES NO
If yes, who? _____

Will alcohol be served at the event? YES NO
If yes, please provide details: _____

Budget Information

Anticipated total revenues: \$ _____

Anticipated total expenses: \$ _____

Anticipated total donation: \$ _____

POLICIES

A. General Requirements:

- The business/organization/individual (hereafter referred to as “your group”) will not open any bank accounts using Trustbridge Hospice Foundation’s (hereafter referred to as “Hospice”) name or Taxpayer Identification Number (TIN). Any check donations listing Trustbridge Hospice Foundation as “Payee” will be forwarded to the Foundation for deposit in a Foundation bank account.
- Only donations made directly to “Hospice” are tax deductible (to the extent permitted by law). Donations made directly to a third party event can thus be used to cover the event’s expenses, but they are not tax deductible.
- Due to limited personnel resources, “Hospice” cannot provide staff support to third party events, however; if your group would like a representative of “Hospice” to attend in an official capacity (to welcome guests, thank participants, make any remarks, or join the ceremonies), please establish this request as soon as possible.
- Your group agrees to minimize expenses related to the third party event.
- Your group agrees to an “open book” policy, and to provide an event plan and budget, if requested.
- All fundraising is to be conducted for the exclusive benefit of “Hospice”. Any variance must be approved by “Hospice” in advance of the event.
- “Hospice” does not release volunteer or donor names.
- A check for the third party event’s net proceeds (i.e. gross proceeds less all related expenses), must be delivered to “Hospice” within 30 days of the event’s conclusion.

Third Party Event Application

B. Solicitation

- “Hospice” cannot solicit for sponsorships, cash, or in-kind donations.
- “Hospice’s” Director of Special Events must approve all solicitations of all gifts, including in-kind donations, by your group before the company in question is approached, thereby avoiding duplication of efforts and excessive requests to any one potential donor.

C. Promotion

- The official logo of Trustbridge Hospice Foundation should be appropriately used in conjunction with an event but may not be altered in any way.
- “Hospice” must review and approve all promotional materials including, but not limited to, advertising, letters, brochures, flyers, and press releases prior to production or distribution.
- The event must be promoted and conducted in a manner to avoid statement or appearance of “Hospice” endorsing any product, firm, organization, individual or service.

D. Obligations and Contracts:

- Only an authorized agent of “Hospice” can enter into any contract on behalf of Trustbridge Hospice Foundation or obligate Trustbridge Hospice Foundation to pay for any service or item connected with the event.

E. Conduct and Decorum:

- “Hospice” will not enter into any agreement for a third party event when there is a potential conflict of interest with “Hospice’s” programs and policies.
- Each third party event shall be administered in a manner appropriate to the mission statement of Trustbridge. No offensive or unlawful conduct shall be associated with any third party event. In addition, any and all sponsors and vendors in said event must adhere to same policy. For purposes of this contract, offensive and unlawful behavior shall pertain to any conduct deemed offensive to “Hospice” in light of Trustbridge’s mission statement and the fundraising purposes for which the third party event is conducted. “Hospice” reserves the right to withdraw its endorsement of any third party events deemed offensive under the above criteria. “Hospice” also reserves the right to refuse any fundraising proceeds from third party events deemed offensive.

F. Liability Insurance:

- Each event will be required to have in place general liability and property insurance limits of liability, which are reasonable in relation to the size, location, and nature of the event as determined by the “Hospice’s” Director of Special Events.
- In addition, at any event in which beer, wine or other alcoholic beverages will be served, the event must also have in place liability insurance against liability that may arise as a result of serving such beverages.
- “Hospice’s” Director of Special Events must approve the limits of liability of insurance obtained with respect to any event at which alcoholic beverages will be served, in advance. Proof of all required insurance shall be submitted to “Hospice’s” Director of Special Events prior to the event.

Third Party Event Application

G. Indemnity:

- Your group agrees to indemnify and hold harmless, “Hospice”, its affiliates, officers, employees, agents, representatives, contractors, and licensees from and against all claims, losses, damages, liabilities, and expenses, including reasonable attorney’s fees, arising out of or occasioned by an act or omission of your group, or it’s officers, partners, employees, agents, contractors, licensees, guests, invitees, or attendees in connection with the third party event.

H. Legal Requirements:

- “Hospice’s” Director of Special Events is pleased to provide your group with the general information needed to assist in meeting necessary legal requirements. However, the ultimate responsibility for meeting these obligations rests with your group. “Hospice” encourages your group to obtain qualified professional assistance in meeting these requirements and any information provided by “Hospice” should not be viewed as a substitute for such assistance or as legal advice.

The above guidelines have been read and agreed to by:

Signature of Organizer

Print Name

Date

APPROVED BY:

Jennifer Thomason
Director of Special Events

Date