



## Guidelines for Conducting Fund Raising Special Events, Benefits, or Promotions to Support Texas Health Resources Foundation



Thank you for your interest in benefiting Texas Health Resources Foundation. Donations to the Foundation are an important vehicle as we strive to enhance the delivery of quality patient care by joining with committed donors to sustain the long-term fiscal viability of Texas Health Resources. The Foundation raises funds that support clinical, educational and research programs across the Texas Health system. Texas Health Resources is one of the largest faith-based, nonprofit health systems in the United States. Together with our generous supporters, the Foundation fulfills a critical role in continuing the Mission of Texas Health to improve the health of the people in the communities we serve.

**Below are useful guidelines to follow as you consider a fundraising special event, benefit or promotion to support Texas Health Resources Foundation.**



- The request for a proposed fundraising special event, benefit or promotion to support Texas Health Resources Foundation must be submitted a minimum of 90 days prior to the event date or project start date. This includes any request to use Texas Health Resources Foundation's name, and/or logo prior to the event. Please be advised that the use of Texas Health Resources Foundation's name and/or logo in any fashion without written authorization may result in Texas Health Resources Foundation withdrawing all support or endorsement of the event. The proposed fundraising event will be reviewed and must be approved by representatives of Texas Health Resources Foundation. You will be notified within approximately 14 days if the proposed event is approved.
- All approved fundraising special events, benefits, or promotions conducted by a third party on behalf of Texas Health Resources Foundation shall be in written agreements (a letter of agreement or LOA that will include language indemnifying Texas Health Resources Foundation against any liability) and clearly describe the rights, duties and obligations of all parties involved. Please note that while Texas Health Resources Foundation may be able to provide guidance to third parties, we are unable to provide administrative, legal, tax or logistical assistance for the event.
- The Texas Health Resources Foundation's name may not be used in the actual title or event name, or in any way that may imply Texas Health Resources Foundation's responsibility or liability of the event. "Proceeds benefiting Texas Health Resources Foundation" may be used in promotional materials, invitations or advertising copy, if approved in advance by representatives from Texas Health Resources Foundation.
- All proposed advertising, copy and promotion materials that contain the Texas Health Resources Foundation's name and/or logo must be submitted for approval to Texas Health Resources Foundation prior to production. Please note that this requirement includes invitations, press releases, public service announcements, posters, banners, fliers and special items (i.e., T-shirts, mugs, caps, etc.) Any products or other item(s) sold at or in connection with events must be non-controversial in nature.
- To avoid duplicating efforts and to protect the use of the Texas Health Resources Foundation's name and/or logo, a written list of individuals, businesses, or corporations to be solicited must be submitted and approved by Texas Health Resources Foundation prior to any solicitation. The proposed list to be solicited may not be sold to individuals and/or other organizations. Please note that Texas Health Resources Foundation's mailing lists are confidential and will be not be released for use.

- Events must comply with all federal, state and local laws governing charitable fundraising, gift reporting and special events. Any individual or organization conducting a third party event will be responsible for obtaining necessary permits and insurance (General Liability Insurance, etc.) If athletic or sporting event, the event organizer must require all participants to sign a waiver/release. It is recommended that the event organizer obtain commercial general liability insurance against all claims for injury to a person including death, or damage to property or loss of property in connection with event with limits of \$1M per event/\$2M aggregate. Texas Health Resources Foundation shall be named as additional insured.



- The event organizer must determine the fair market value of all items, services or privileges associated with the event in advance and inform donors of the amount in all manners required by the IRS. Event organizers must provide Texas Health Resources Foundation with evidence of compliance with IRS requirements.
- Texas Health Resources Foundation requests that it receive at least 50 percent of the net revenues of any third-party fundraising event. Requests for exceptions to this policy may be submitted to Texas Health Resources Foundation. All funds must be distributed to Texas Health Resources Foundation within 60 days following the conclusion of the event.

Individuals or organizations conducting events that benefit Texas Health Resources Foundation should provide one check for the event proceeds, along with an accounting of those proceeds. Sponsors, underwriters, attendees and participants must make their payment for the events directly to the individual or organization conducting the event. Event organizers cannot offer sponsors, underwriters, or attendees the option of writing their checks for the event directly to Texas Health Resources Foundation for tax purposes. Event organizers should not make statements or take any actions which would imply that event fees or sponsorships are tax-deductible payments to Texas Health Resources Foundation. If a sponsor, underwriter, attendee or participant is interested in making a donation directly to Texas Health Resources Foundation (separate and apart from the event fee); we will accept and acknowledge those donations separately from the event.

- Texas Health Resources Foundation cannot be responsible for ticket sales to the event, sponsorships or assisting with sales of products for any fundraising activity or event. Event organizers must be able to sell tickets to the proposed event.
- Texas Health Resources Foundation cannot sponsor raffles conducted by external groups and/or organizations. Texas Health Resources Foundation requires that all raffles conducted be in compliance with the Texas Charitable Raffle Enabling Act.
- Please be advised that if the Texas Health Resources Foundation's name is associated with the event in any way, if the circumstances warrant, Texas Health Resources Foundation may at any time direct you to cancel the event. You hereby agree to cancel the event, if so directed, and further agree to release all Texas Health Resources and its affiliated entities, including Texas Health Resources Foundation, their officers, directors, and employees from any and all liability from the event.

## What Texas Health Resources Foundation can do to assist you with your event, in accordance with policy:

- Attend events or check presentations, as schedule allows.
- Provide and approve the use of Texas Health Resources Foundation's name and logo as appropriate.
- Assist donors in directing contributions toward areas of special interest or areas of need within Texas Health Resources.
- Provide a letter of authorization to validate the authenticity of the event and its organizers.



## What Texas Health Resources cannot do:

- Guarantee event attendance by employees, patients, physicians, or volunteers.
- Promote, publicize or sell tickets for your event.
- Provide tax deduction letters/statements from Texas Health Resources Foundation, or permit the use of their federal identification number for sales tax exemption.
- Provide funding or reimbursement for expenses.
- Provide mailing lists of donors, vendors, board members, medical staff members, employees or any other affiliated Texas Health Resources constituencies.
- Provide Texas Health Resources Foundation stationery.