

Third Party Fundraising Guidelines



- All fundraising events for St. Joseph's Foundation, Barrow Neurological Foundation and/or The Congenital Heart Foundation ("the Foundations") require advance written permission from the Foundation.
- Promoting the event through public announcement or any other public relations is not allowed until written permission is granted and received from the Foundations.
- Events must align with the mission and appropriate image for the Foundations and St. Joseph's Hospital ("the Hospital").
- Events must comply with all relevant laws, including the laws of the State of Arizona.
- The Foundations cannot sponsor or endorse fundraising events or products. Printed materials and other information should state "Proceeds will benefit St. Joseph's Foundation/Barrow Neurological Foundation/The Congenital Heart Foundation."
- The Foundations **must review all promotional materials**, including press releases, public service announcements, scripts, posters, invitations, before they are used.
- The Foundations' logos are registered trademarks and cannot legally be reproduced without permission.
- If circumstances warrant, the Foundations may at any time, through any of their officers, directors and/or senior administrators, direct you to cancel the event. You hereby agree to cancel the event. If so directed, you further agree to release the Foundations and its officers, directors and employees from any and all liability and connection to any such action.
- When approaching businesses and corporations for assistance with events, please remember that many local organizations are already involved in supporting the Foundations/the Hospital and may not wish to make additional donations. Please clear all business contacts with the Foundations before approaching them for support/participation.
- The Foundations do not provide contact information of its corporate sponsors, donors and supporters for solicitation purposes. Rather, the Foundations agree to promote the event/organization, when appropriate, through exposure at existing events, the Foundations' publications, Facebook, Twitter and websites.
- A Foundation representative may be able to attend your fundraising event. Personal appearances by Foundation staff will be handled on a case-by-case basis. We will attempt to respond to your request. Please recognize that the volume of requests exceeds our available staff. Indicate on the application form if you would like to request a representative, and please contact the Foundation two (2) weeks prior to the event to confirm.

WHAT YOU NEED TO DO:

- Submit a "Fundraising Event Application Form" and a signed copy of the "Guidelines for Fundraising Events" to the Foundations for review at least six (6) weeks before your proposed event. Please include any additional materials outlining the proposed event.
- If a Special Event Liquor License is needed for your event, the process for application must be started sixty (60) days prior to the event date. The required signature from the Foundations should be obtained in a timely manner.
- The person representing the event must obtain any necessary permits, licenses or insurance. Please attach completed copies to your application.
- The sponsors agree to indemnify and hold harmless the Foundations and all their officers, directors and employees from any and all claims and liabilities in any way related to the event.
- The public should be fully informed regarding any net amounts that will actually be donated to the Foundations. Potential donors must be informed whenever less than 100 percent of the net proceeds will be donated to the

Foundations. (For example: "Ninety percent of the proceeds will benefit St. Joseph's Foundation/Barrow Neurological Foundation/The Congenital Heart Foundation.")

- The I.R.S. requires that all tickets, invitations or entry forms state what portion of the contribution is tax deductible. If donors will receive a product or service in exchange for their donation, subtract the value (whether or not it is donated) of the product or service from the contribution. The remaining amount is tax-deductible.

(For example, the written materials could state: "The portion of the payment for each ticket that is deductible for federal income tax purposes is limited under the federal tax laws to the excess of the payment over the value of the goods or services provided to a person attending this event. We estimate that the value of goods and services provided to each person attending will be \$ _____. Accordingly, the amount of your payment that is deductible for federal tax purposes is \$ _____ per ticket.

If your event is held to benefit the hospital's general services or a special-purpose fund, your written materials should state: "Proceeds raised support St. Joseph's Foundation's/Barrow Neurological Foundation's/The Congenital Heart Foundation's nonprofit programs, services and medical facilities. To learn more, please contact St. Joseph's Foundation/ Barrow Neurological Foundation/ The Congenital Heart Foundation at (602) 406-3041 or SupportStJosephs.org/SupportBarrow.org/SupportCongenitalHeart.org.

*****Please advise the Foundation of any changes in your event.*****

FINANCIAL GUIDELINES:

- If event expenses are greater than the total collected, the group holding the event is responsible for payment of these additional expenses.
- Within 45 days after the last day of the fundraising event, please send a final accounting of income and expenses to the Foundations. **A check made payable to St. Joseph's Foundation, Barrow Neurological Foundation and/or The Congenital Heart Foundation should be sent to: 3110 N. Central Ave. #135 Phoenix, AZ 85012.**
- If the budget for your fundraising event is greater than \$10,000, you should establish a separate bank account. The title of the account should say "...to benefit St. Joseph's Foundation/Barrow Neurological Foundation/The Congenital Heart Foundation." Only event expenses may be deducted from this account, and all donations are to be held in trust for the Foundations.

Until written permission is received, the name "St. Joseph's Foundation, Barrow Neurological Foundation and/or The Congenital Heart Foundation" should not be used for any purpose, and contributions should not be solicited.

I have read and agree to follow the above guidelines;

Sponsoring Organization

Contact Name

Signature

Date

Phone

E-mail

Please keep a copy of these Guidelines for your reference. Please return your completed "Fundraising Event Application to St. Joseph's, Barrow Neurological and/or The Congenital Heart Foundation, 3110 N. Central Ave #135, Phoenix, AZ 85012 or by fax to: (602) 602-1075. Please call (602) 406-3041 for additional information.