

## **Third Party Special Event Policy**

Thank you for your interest in hosting an event or promotion to benefit Tidewell Hospice.

We are deeply grateful for the generous support of our friends in the community who share our commitment to compassionate care and quality-of-life programs for people of all ages who are dealing with advanced illness, regardless of their ability to pay.

Any fundraising activity benefiting Tidewell Hospice must be approved in advance by the Community Affairs and Philanthropy Departments. The enclosed **Third Party Special Event Proposal Application** must be completed and filed with the Philanthropy Department no less than 30 days prior to the proposed event date before approval can be granted.

After reviewing these guidelines, please complete and sign the attached agreement and return it to:

Tidewell Hospice  
c/o Philanthropy Development  
5955 Rand Blvd.  
Sarasota, FL 34238

You will be contacted within 10 days of the date your application is received.

We look forward to learning more about your proposed event. In the interim, if you have any questions, please call 941-552-7551. On behalf of the patients and families we serve, thank you for supporting Tidewell Hospice.

## **THIRD PARTY SPECIAL EVENT POLICY**

Tidewell Hospice, referred to as Tidewell, is pleased to be the beneficiary of financial support as a result of Third Party Special Events or projects by generous individuals, groups and organizations.

### **How can we help:**

Tidewell's ability to offer services for third party fundraising events is limited by staff size and internal obligations. Tidewell is able to provide the following:

- A letter of authorization to validate the authenticity of the fundraising event.
- Informational brochures or fact sheets about Tidewell's programs and services.
- Attendance at the event and/or reception to receive proceeds by a member of Tidewell's staff, based on availability and scheduled in advance
- Use of Tidewell's logo and name upon review and approval of event and materials.
- Written tax receipts to donors who make checks payable to Tidewell Hospice.
- When tax receipts are requested for cash donations, the third-party event organizer is responsible for collecting the names, addresses and contact information of the donors.

### **General Policies**

- The Community Relations and Philanthropy Departments must approve any fundraising event before contributions can be solicited in the name of Tidewell, nor should Tidewell's name or logo be used for any reason without approval.
- Reoccurring annual events or one-time events require application approval on a pre-event basis.
- Community Affairs Department and Philanthropy Department reserve the right to deny any application for a special event or fundraising program.
- For events that occur annually, all proceeds from the previous year's event must be received by Tidewell before approval is given for future events.
- Tidewell does not release donor, volunteer, employee, physician, patient, board member or other mailing lists or information to outside groups for any reason.
- Tidewell does not provide financial support to third-party fundraising.
- Tidewell will not solicit sponsorship revenue for outside fundraising activities organized by a third party.

**Tidewell will not approve:**

- Events that require financing from Tidewell.
- Events that involve a professional fundraiser, telemarketer and/or involves an agreement to raise funds on a commission, bonus or percentage basis or consist of door-to-door solicitation of any kind.
- Events that require Tidewell's endorsement or marketing of a product or service or Tidewell's participation in the direct sale of a product or service. This includes vending machines of any kind.
- Events that compete or conflict with an already established or scheduled event to benefit Tidewell.
- Events that refer to tobacco or alcohol in the title. Furthermore, alcohol permits may not be obtained in the name of Tidewell.
- Events that fail to comply with any municipal, county, state and/or federal law.

**Legal Policies:**

- Tidewell is not liable for any injuries sustained by event volunteers or participants related to a third-party fundraising event benefiting Tidewell and cannot assume any type of liability at said event.
- The event planners are responsible for obtaining any necessary permits, licenses and insurance required.
- No contracts or service agreements should be signed before event approval is granted. Tidewell reserves the right to review all related contracts and agreements.

**Publicity Guidelines:**

- Event publicity is the responsibility of the event organizers; however, event publicity such as flyers, press releases, public service announcements, etc. must be reviewed by the Tidewell Communications Department.
- Previously established annual events, raising significant funds or attracting broad viewership may warrant press releases directly from the Communications Department.
- Publicity will not suggest that the event is being sponsored or co-sponsored by Tidewell or that Tidewell is involved in any way except as the beneficiary of proceeds.
- The suggested way to describe Tidewell's involvement is to list the event name followed by "benefiting Tidewell Hospice " or "to benefit Tidewell Hospice" and clearly stating how Tidewell is to benefit, i.e., "net proceeds" or "a percentage of sales."

**Guidelines for uses of Tidewell's logo:**

- The sponsoring organization's name and/or logo must appear in a prominent location in all advertising and promotional materials.
- Tidewell's logo may be used only in conjunction with Tidewell's name.
- Tidewell's logo may only be reproduced in its original colors or black and white.
- Any promotional materials bearing the Tidewell logo must be reviewed by the Communications Department before being introduced to the public.

**Financial Guidelines:**

- Event organizers are responsible for payment of all event expenses.
- If the event expenses are greater than the total collected, the group holding the event is responsible for payment of any additional expenses.
- If Tidewell is designated or portrayed to the public as sole beneficiary, Tidewell should receive 100% of the net proceeds.
- In the event an organization or any other charity, in addition to Tidewell, is a beneficiary, this information must be clearly stated in all materials.
- Bank accounts in the name of Tidewell are not permitted.
- Internal Revenue Service codes must be followed.
- When requested, a summary of income and expenses must be maintained and presented to Tidewell's Philanthropy Department by the third party organizer at the close of the event. In the case of income donations coming directly to Tidewell (i.e. event tickets), the Philanthropy Department will provide a listing of income/donations to event organizers.
- Net proceeds should be received by Tidewell within 60 days of the conclusion of the event.
- At the completion of the event, all checks should be made payable to **Tidewell Hospice** and mailed to:

**Tidewell Hospice  
c/o Philanthropy Development  
5955 Rand Blvd.  
Sarasota, FL 34238**

**THE ABOVE THIRD PARTY SPECIAL EVENT POLICY HAS BEEN READ AND AGREED TO BY:**

Contact Name:	Date:	
Address:		
Phone:	Fax:	E-mail:

Please send or fax completed application and signed Third Party Policy Agreement at least 30 days prior to the proposed event to :  
**Tidewell Hospice**  
**c/o Philanthropy Development**  
**5955 Rand Blvd.**  
**Sarasota, FL 34238**  
**Fax: 941-552-7514**

**THIRD PARTY SPECIAL EVENT APPLICATION**

Name of group/organization planning event: \_\_\_\_\_

Name of individual(s) in charge of event: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Name of event: \_\_\_\_\_ Date/Time of Event: \_\_\_\_\_

Location of event: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Event is:  Open to the public  Invitation only Ticket Price: \$ Table Price: \$

Has this event taken place before:  Yes  No If so, when? (date) \_\_\_\_\_

Will the amount raised be matched?  Yes  No

Briefly describe the event and the fundraising components (ticket sales, table sales, raffle, auction, sponsors, etc.)  
Please use the back of this form if you require additional space.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Would you like to have someone from the Tidewell's speakers bureau present at your event?  Yes  No

Do you plan to use the Tidewell logo in any of your promotional materials?  Yes  No

If yes, please provide designer's email address: \_\_\_\_\_

Will you need Tidewell brochures?  Yes  No How many? \_\_\_\_\_

Will all net proceeds go to Tidewell?  Yes  No

If no, list additional beneficiaries: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Today's Date: \_\_\_\_\_

**Please fill out and fax to the attention of Aida Matic: 941-552-7514 or e-mail to amatic@tidewell.org**

APPROVED:

Community Affairs Dept.

Philanthropy Dept.