



Fundraising and Special Events Policy for the Agencies of the Home Health Foundation: Home Health VNA, Merrimack Valley Hospice, Home Care, Inc.

By hosting a fundraiser on behalf of one of our agencies, you'll bring comfort and care to many who are seriously ill, recovering from a medical condition or nearing end-of-life. Your efforts will also help members of their families to cope with such life-changing events. Thank you for helping to make this possible by organizing a third party event or activity.

This document outlines the policies for independent individuals, organizations or companies (Organizer) who organize such events to benefit one of our agencies (The Agency).

How We Can Help:

The Agency provides the following support for third party fundraising events:

- A letter of authorization to validate the authenticity of the event or fundraising effort by the Organizer.
- Items for distribution: Informational brochures or fact sheets about The Agency. Due to cost constraints, we are not able to provide give-away items or promotional gifts.
- Publicity in internal employee newsletters and Agency website prior to the event
- Use of The Agency logo and name upon review and approval of The Organizer's event and materials.
- Written tax receipts to donors who make checks payable directly to our agency.
- Support and advice on event planning is offered via our online toolkit.
- Attendance at the event by a member of our staff may be available, pending review of your proposal and our availability.

General Policies:

- The Special Events staff must approve any fundraising event or promotion that involves the use of the Agency's logo or name in advance.
- A Third-Party Event Proposal form must be completed and approved by The Agency before contributions can be solicited in the name of their agency.
- Approval will be granted on a per event basis.
- The Agency reserves the right to deny any application for a third-party fundraising program that does not appropriately reflect the mission and values of our agencies.
- For events that occur annually, all proceeds from the previous year's event must be received by The Agency before approval for future events is given.
- The Agency does not release donor, volunteer, employee, physician, patient, board member or other mailing lists or information to outside groups for any reason.
- The Agency does not provide financial support to third-party fundraising.
- The Agency cannot solicit sponsorship revenue for outside fundraising activities organized by a third party.
- The Agency must approve all potential sponsors of the third-party event.
- The Agency's may receive funds from other similar promotions. Acceptance of a proposal by The Organizer



does not create or suggest exclusive rights to The Organizer.

- The Agency may cancel the rights to the Organizer if the agreement is breached or policies are not met.

The Agency will not approve:

- Events that require any financing from The Agency
- 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 Agency endorsement or marketing of a product, services or participation in the direct sale of a product or service.
- Events that compete or conflict with an already established or scheduled event to benefit The Agency.
- Events that refer to tobacco, alcohol or fire arms in the title. Furthermore, alcohol permits may not be obtained in the name of The Agency.
- Events that fail to comply with any municipal, county, state and/or federal law.

Legal Policies:

- The Agency is not liable for any injuries sustained by event volunteers or participants related to an event benefiting our agencies and cannot assume any type of liability for your event.
- The event planners are responsible for obtaining any necessary permits, licenses or insurance required.
- No contracts or service agreements should be signed before event approval is granted. We reserve the right to review all related contracts and agreements.

Publicity and Promotional Guidelines:

- Event publicity is the responsibility of the event organizers, however, The Agency may aid with publicity at our discretion. The Agency does not purchase advertising to promote third-party events.
- Publicity may not suggest that the event is being sponsored or co-sponsored by our agency or that we are involved in any way except as the beneficiary.
- The suggested way to describe the benefit to list the event name followed by “benefiting or to benefit The Agency”
- Please state clearly how the Foundation is to benefit, i.e. “net proceeds” or “a percentage of sales.”
- The Agency is willing to share patient stories for use in events that qualify and are approved.

Guidelines for uses of Agency’s logo:

- The Organizer’s name and/or logo must appear in a prominent location in all advertising and promotional materials.
- Any promotional materials bearing The Agency logo must be reviewed and approved by The Agency before being introduced to the public.
- The Agency’s logo may only be reproduced in its original colors or black and white



Financial Guidelines:

- The Organizer is responsible for payment of all event expenses.
- If the event expenses are greater than the total collected, The Organizer is responsible for payment of these additional expenses.
- If The Agency is designated or portrayed to the public as sole beneficiary, The Agency should receive 100% of the net proceeds.
- In the event that any other charity in addition to The Agency is a beneficiary, this information must be clearly stated in all materials and distribution of the proceeds must be made on an equitable basis agreed upon in advance by The Agency.
- Bank accounts in the name of The Agency are not permitted to be established.
- Internal Revenue Service codes must be followed.
- If requested, a summary of income and expenses must be maintained and presented to the Special Events Office by the third party organizer at the close of the event.
- In the case of income donations coming directly to the Foundation (checks payable to our agency or online donations made to us), the Foundation office will provide a listing of income/donations to event organizers.
- Net proceeds should be received by The Agency within 30 days of the conclusion of the event.
- At the completion of the event, all checks should be made payable to The Agency and all forms should be sent to:

Attn: Philanthropy Department/External Relations
Home Health Foundation
360 Merrimack Street, Building 9, 4th Floor
Lawrence, MA 01843

REV 080415

Third-Party Fundraising Event Proposal Form

Thank you for offering to host an event or plan a fundraising effort to benefit patients and families served by our agencies (Home Health VNA, Merrimack Valley Hospice, or Home Care, Inc.). Funds raised will enable us to provide more services and reach more people who might not otherwise be able to receive home health care and supportive programs.

Please complete this proposal and agreement form so that we can better understand your intentions and help ensure your success.

Organizer (Individual/Organization/Company)

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Ext.: _____ Fax: _____

Website: _____

Contact Information of the Lead Person (if different from above):

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Ext.: _____ Email: _____

Event Information

Name of Event:

Date of Event: _____ Time: _____

Event Location:

Cost of admission/participation:

Anticipated number of attendees/participants: _____

Which agency would you like your event to benefit:

- Home Health VNA (home medical care for patients of all ages)
- Merrimack Valley Hospice/House (care of patients with long-term illness/end-of-life)
 - Friends of Merrimack Valley Hospice
- Home Care, Inc. (home and personal assistance for independent living)
- Wherever the need is greatest

Percentage of your estimated net proceeds will be contributed to The Agency? _____%

If less than 100%, what other organization(s) will share in the net proceeds? _____

Briefly describe the event:

(Please note: We reserve the right to withhold approval should there be a conflict with The Agency's mission, vision or values)

Budget and Funding

How will funds be raised? _____

Will you have any of the following at your event?

Raffle _____ Auction _____ In-kind donations (toys, crafts, books, etc.) _____

Does your event have sponsors? (corporate, media, etc.): _____

Please attach a proposed budget for your event. Be as specific as possible.

(Please note: The Agency will not be responsible for any debt or costs incurred by this event. Costs cannot be passed through or billed through The Agency in any way.)

I plan to submit the funds by: mail _____ personal delivery _____ other (specify) _____

Promotion

How will the event be publicized/promoted?

- Advertising
- Email
- Mailing
- Poster/flyers
- Press Release
- Newsletter
- Website
- Other: _____

Will you have an event website? Yes _____ No _____ Web address: _____

(Please note: The Agency does not purchase advertising for promotion of third party fundraising events.)

Plan for publicity: (All materials must be reviewed and approved by The Agency)

Press releases to be sent to: _____

Flyers to be distributed to: _____

Public service announcement to be distributed to: _____

Other: _____

Please describe what assistance, if any, you are requesting from The Agency's staff and/or volunteers:

Agreement

I agree to the terms and conditions contained in the Policies and Procedures for Third-Party Event Organizers attached to and made a part of this application. I understand that my event is not considered an approved event until written approval of my application is received from the Home Health Foundation, parent organization of Home Health VNA, Merrimack Valley Hospice and Home Care, Inc. No amendment, modification or waiver of any of the terms and conditions contained in this document and the Policies and Procedures for Third-Party Event Organizers shall be valid unless in writing.

At no time will The Agency be responsible for the cost, planning or staffing of my event, nor will it or its representatives be liable for personal injuries or damages to property which may occur during my event. I agree to indemnify and hold harmless The Agency and their employees, agents and representatives, from any and every claim, demand, suit and payment related to or caused by my event.

Print your name: _____ Date: _____

Your signature: _____

Return completed application to Lauren Brousseau at lbrousseau@homehealthfoundation.org or by mail to

Lauren Brousseau, Development Officer
Home Health Foundation
360 Merrimack Street, Building 9
Lawrence, MA 01843

For questions, please call 978-552-4927.

Some ideas for third party fundraising events are listed below:

Food events

- Bake Sale
- Dessert Reception
- Chili Cook-Off
- Ice Cream Social
- Cake / Cookie Walk
- Sock Hop
- Wine Tasting
- Pasta dinner

Pets

- Doggie Bath
- Pet costume contest
- Pet Show

Sports

- Bowling Tournament
- Celebrity Basketball
- Kick-ball Tournament
- Ice-skating party
- Ultimate Frisbee Tournament

Easy for Kids

- Penny Drive
- Refreshment Stand
- Kite Flying Contest

Grown-up fun

- Las Vegas Night
- Dance-a-thon
- Motorcycle Ride
- Bingo Night
- Jazz Festival
- Kentucky Derby Party
- Murder Mystery Dinner
- Mystery Bus Ride

Hobbies

- Craft Fair
- Fashion Show
- Fishing Contest
- Quilt Show / Raffle
- Recipe Book
- Book Sale

Family fun

- Wii Tournament
- Talent Show
- Car Wash
- Flower or Plant Sale
- Pictures with Santa

Other Ideas

- Blue Jean Day – a donation of \$X goes to the fundraiser and “allows” the person to wear jeans to work that day.
- Garden Tour
- Baby Picture Contest
- Yard Sale
- Sales of magnets, mousepads, other items made in multiples. For example: girls drew pictures, turned them into magnets, raised \$600 selling the magnets.

Promoting Your Third-Party Fundraiser

Community event listings:

Your local newspapers and cable access TV may promote your fundraiser via their calendar and events listing sections. Send at least 3 weeks in advance of when you want the notice to appear as they often need time to prepare them. Web listings often are posted on the same day. Be sure to allow time for someone to buy tickets or prepare to support your activity/event.

Event Name

Date, time

Location

Cost

Brief explanation, if needed

Contact information (phone number, website)

To benefit _____

Use Your Social Network

Set up an event from your Facebook page. You can set up the event, time, place, and all other information via an event invitation. You can send the invitation out to your Facebook friends as well as post it to your status to help spread the word.

Make some News!

If you are doing something unique, or have an interesting story to tell about why you are holding your fundraiser for us, you can contact your local newspaper to see if they are interested in doing an interview with you as a local person making an impact. Unusual events, things that have a particularly fun aspect to what you are doing, or an emotional connection are often interesting as a human interest story. Contact the Lifestyle editor of your paper or the person who covers happenings in your town. You may want to call them first and follow up with an email that outlines the details of the event as well as the “why or how” that makes it have an impact.