



To: Prospective Third Party Event Coordinator
From: CaringBridge
Re: Fundraising Events to support CaringBridge

Thank you for your interest in planning an event to benefit CaringBridge. Benefit events can take many forms from golf tournaments and 5K runs to black tie galas. We are open to exploring these ideas and others with you.

We are fortunate to receive numerous inquiries and proposals from companies, individuals and families that would like CaringBridge to be the recipient of the proceeds from their fundraising event. If you are interested in planning an event to benefit CaringBridge, you must submit a completed and signed **Benefit Event Proposal** form (see attached).

Submission of these documents is due at least 1 month or more prior to the event. Each proposal is carefully reviewed and evaluated for feasibility and suitability with our organization's goals and objectives.

The following is a partial list of the criteria that will be used to evaluate proposed events:

- Does the event support the mission and image of CaringBridge?
- Does the event have a realistic budget, timeline, and plan?
- What is the estimated amount of proceeds from the event?
- Who will chair the event?

CaringBridge does not advance monies, provide donor lists, or solicit sponsorship revenue for fundraising events. Additionally, our organization's ability to provide services for your event is limited by staff size and internal fundraising obligations. We state this information in advance so that there are no disappointments or misunderstandings with regards to our ability to participate with you and support your fundraising event.

Once again, thank you for your interest in planning an event to benefit CaringBridge. Please allow one week for the CaringBridge to review and respond to your proposal.

Third Party Event Policies & Procedures

Third party fundraising events should fit the mission and promote the appropriate image for CaringBridge.

CaringBridge Mission

Our mission is to bring together a global community of care powered by the love of family and friends in an easy, accessible and private way.

Permission

The Attorney General's office notes that CaringBridge retains a fiduciary duty to ensure that the CaringBridge name is being used properly, that the funds are being handled and accounted for in a responsible manner, and the fundraising is being conducted in a manner that is consistent with the CaringBridge mission and public image.

- All fundraising events for CaringBridge require written permission from CaringBridge in advance. Do not make public announcements or promote the event until you receive approval of your event proposal.
- Fundraising events must comply with all relevant state and federal laws.

Event Timing

It is the policy of CaringBridge to maintain a list of all event and other fundraising efforts that benefit CaringBridge. This includes activities of CaringBridge and events sponsored at-large by others in the community.

- It is the responsibility of the event coordinator to approve the fundraising event date with the CaringBridge Benefit Events staff to ensure no duplication of event or event dates. This allows for sufficient time between events to maximize support, enthusiasm and attendance at your event.

Event Promotion & Logo Usage

- CaringBridge must review all promotional materials (including press releases, public service announcements, scripts, posters, brochures, etc.) before they are used.
- The CaringBridge logo is a registered trademark and cannot legally be reproduced without written permission.

Event Language

- Any promotional materials must be clear that your event is raising funds that will benefit CaringBridge.

Financial Guidelines

- Event expenses should be less than thirty percent (30%) of the total amount raised, excluding in-kind donations.
- If event expenses are greater than the total collected, the group conducting the event is responsible for payment of these additional expenses.

- CaringBridge sales tax-exemption (on purchases) cannot be extended to any event or fundraising effort.
- CaringBridge cannot process any credit cards for your event.
- If attendees of your event need a tax receipt, their donation must be made directly to CaringBridge in the form of a check written to CaringBridge or by using the CaringBridge online donation program.
- Within 30 days after the last day of the event, please send a check made payable to *CaringBridge*.

Sponsorship

- CaringBridge cannot solicit sponsors for your fundraising event and does not provide any donor contact information.
- Printed materials and other information should state, "Proceeds will benefit CaringBridge."
- Please provide a list of all potential sponsorship contacts (including all potential in-kind donors) to CaringBridge. This will allow us to provide you information on their current financial support for CaringBridge and help us to be good stewards of our longstanding relationships within the community.
- CaringBridge does not solicit or accept alcohol, beer, wine, tobacco, or casino sponsorships as title sponsors for any events. Alcohol, beer, wine, tobacco and casinos may be event sponsors but may not be promoted with or by the event, e.g. using "sponsored by" language or using logo next to or with the CaringBridge logo. Beer, wine and casino donations may be accepted for auctions.

In-kind Sponsorship

- In-kind sponsorship is defined as a donation of a product or service such as printing or silent auction items.
- CaringBridge cannot solicit in-kind sponsors for your fundraising event.
- The value of in-kind sponsors/donations should not be included in your total event revenue, but should be acknowledged by the event coordinators.
- CaringBridge will not receipt in-kind donations.

Cancellation, Liability & Changes

- If circumstances warrant, CaringBridge may at any time through any of its directors, officers, senior administrators, direct you to cancel the event. You hereby agree to cancel the event, if so directed, and further agree to release CaringBridge and its officers, directors, and employees from any and all liability and connection to such action.
- The sponsors agree to indemnify and hold harmless CaringBridge and all its officers, directors, and employees from any and all claims and liabilities in any way related to the event.
- You must advise CaringBridge of any changes in your fundraising event.

What We Can Do For You

- Acknowledge direct contributions to CaringBridge. These contributions will be added to your event donation total, but cannot be withdrawn for event expenses.
- Approve the use of CaringBridge name and/or logo.
- Provide a letter of support to be used to validate the authenticity of the event and its organizers.
- Provide limited existing CaringBridge materials for your event such as brochures, small posters, and videos.

Thank you again for your interest in planning an event to benefit CaringBridge. Philanthropic contributions such as yours help us to meet the needs of the families that use CaringBridge. An event representative is always available for questions or guidance. Thank you!

Event Proposal Form

PERSON/ORGANIZATION PLANNING EVENT: _____

CONTACT NAME: _____

MAILING ADDRESS: _____

CITY/STATE: _____ ZIP: _____

TELEPHONE: _____

EMAIL ADDRESS: _____

NAME OF PROPOSED EVENT: _____

EVENT LOCATION: _____

ADDRESS OF LOCATION: _____

PROGRAM TO BENEFIT: _____

COST TO PARTICIPANTS: _____

EXPECTED DONATION AMOUNT: _____

Briefly describe the event:

I have read and agree to follow the above policies and procedures:

Event Name

Signature

Date

Please keep one copy of these policies and procedures for your reference and return the original signed copy with your completed Event Proposal Form to:

CaringBridge
Attn: Kelly Espy
1715 Yankee Doodle Road, Suite 301
Eagan, MN 55121