

Thank you for considering Legacy Community Health (hereinafter referred to as “Legacy”) as a beneficiary of your fundraising event. We welcome new and innovative fundraising and awareness raising events that support the mission of Legacy.

By supporting Legacy Community Health you are helping us to empower our clients to lead better lives by providing premium, compassionate, primary healthcare services. Not only are the funds raised from these events used to support the variety of health-related programs and services that Legacy offers to the community, they also help raise awareness of Legacy and our mission.

Legacy cannot help with the funding of your event, but we can help in other ways to make it a success. Please read the following policies and guidelines carefully. They have been established to protect you, your fundraising group, Legacy, and its patients/clients.

If you have any questions on any of the guidelines listed below, please contact Renita Cooksey, RCooksey@legacycommunityhealth.org or 832.548.5144.

What is a third party event?

A third party event is a fundraising activity or event organized, staged and funded by a non-affiliated individual or group, such as a community group, club, or business, who wish to raise money on behalf of Legacy Community Health Services and where Legacy has no fiduciary responsibilities and little or no staff involvement.

These events may include two types:

1. *Non-affiliated* - This type connects Legacy with an existing event, activity or program, and a portion or all of the proceeds are donated to Legacy.
2. *Special Interest* - This is the organization of an independent event specifically designed to raise funds for Legacy, with all net proceeds going to benefit Legacy.

How We Can Help?

Legacy is able to provide the following support for your event:

- A letter of authorization to validate the authenticity of the fundraising event.
- Acknowledgement of the third party fundraiser with appropriate recognition.
- Informational brochures or fact sheets about Legacy’s programs and services.
- Attendance at the event and/or reception to receive proceeds by a member of Legacy’s staff, based on availability and scheduled in advance.
- Use of Legacy’s logo and name upon review and approval of event and materials.

GENERAL GUIDELINES

- Legacy's Board of Directors' Development Committee must approve the third-party community event before contributions can be solicited in the name of Legacy.
- An event application/proposal must be submitted for review and approval before initiation of the event takes place. Application must be agreed upon by both the outside party and Legacy.
- Legacy must receive a completed Third-Party Community Event Proposal at least 6 weeks prior to the event.
- An approval from Legacy must be received prior to using Legacy's identity in the event.
- It is recommended that the event should establish a timeline and action plan a minimum of three (3) months before the event.
- Legacy should receive a list of targeted sponsors for the event – before they are approached – to minimize overlap with other fundraising campaigns underway by Legacy.
- Legacy reserves the right to decline any sponsorship which Legacy believes may have a negative reflection on Legacy or is not in keeping with our mission.
- Legacy reserves the right to decline endorsement of an event if other non-profit organizations are beneficiaries and/or involved in the event without mutual compliance.
- The event will be promoted and conducted in a manner to avoid statement or appearance of Legacy's endorsement of any product, firm, organization, individual or service.
- Legacy reserves the right to participate in similar promotions and other third-party community events.
- Legacy is not liable for any injuries sustained by event volunteers or attendees and cannot assume any type of liability at the event.
- Third-party community event organizers will have attendees complete a waiver for release from liability when requested by Legacy.
- Third-party community event organizers are responsible for obtaining any necessary permits, licenses and insurance required.
- All third-party community events should be accessible to people with disabilities. The event should take place at a location that meets ADA regulations.
- Legacy will not approve 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.
- Legacy will not approve events that fail to comply with any municipal, county, state and/or federal law.
- Legacy reserves the right to decline an event which competes or conflicts with an already established or scheduled event which benefits Legacy.

Financial Policies

- Third-party community event organizers are responsible for payment of all event expenses.
- The third party fundraising organization shall present Legacy with a projected donation amount and an established budget at the onset.
- Legacy reserves the right to decline any underwriting and/or sponsorship when it believes that the association may have a negative effect on the credibility of Legacy.
- Bank accounts in the name of Legacy are not permitted.
- The third party fundraising organization will handle all monies for the event and present the proceeds to Legacy within 30 working days of the completion of the event.
- Legacy is not responsible for any financial loss incurred from the event.
- Legacy reserves the right to inspect all event financial records.
- All proceeds will be submitted to Legacy Community Health Services in the form of one check made out to Legacy Community Health Services within 30 days of the event date indicated above.

Publicity Guidelines

- Legacy's Development Department must approve all promotional materials and/or advertisements pertaining to the event using Legacy logo or identity prior to production and distribution.
- The official Legacy logo is copyrighted and should be appropriately used in conjunction with the event, but may not be altered in typeface, color, configuration and/or position. Any use of the Legacy logo must adhere to established graphic standards.
- The third party fundraiser shall cross-promote the event via their social media outlets and electronic mediums. These include but are not limited to: blogs; email; email distribution lists; Facebook; newsletters; Twitter; and websites.
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- The third party fundraiser shall embed a hyperlink on their event site to Legacy's website.
- The third party fundraiser shall take full responsibility for any costs incurred by purchasing any media advertisement to promote an event (e.g., television, radio, outdoor, billboard, PSA, magazine or brochure).
- Event names may not incorporate the name Legacy as in *The Legacy Walkathon* but may use a second line identifying the relationship with Legacy such as *The Neighborhood Walkathon, benefiting Legacy Community Health*.

Proposal Review

Legacy will review the Third-Party Community Event Proposal. In order to help you evaluate your requirements, the following are considerations that Legacy will use in the evaluation of an application:

- Have you provided sufficient information in your application?
- Does the initiative fit within the mission of Legacy?
- Does the timing of the initiative work with our current roster of activities?
- Does the initiative break any Legacy policies?
- Is the fundraising plan achievable?
- Is there a cancellation plan in place?
- Have you obtained all necessary licenses, permits, and insurance for the event?
- What is the Revenue/Expense Ratio based on the Budget provided?

Application Approval

If your application is approved, we will provide you with a *Letter of Agreement* within two weeks of receiving your application. The *Letter of Agreement* may be shown to potential donors, sponsors, and volunteers.

- Due to privacy regulations, Legacy cannot release donor, volunteer, employee or client mailing lists for the purpose of additional solicitation of funds by third-party groups.
- Legacy will not disclose patient or client names or stories for the promotion or staging of your event.
- All donor information from your event will be kept confidential. Legacy will not share, trade or sell any of the donor information. Legacy maintains a strict policy of respecting donor privacy.

Document Submission

Third party community event/program organizers must submit a signed copy of both the Third-Party Community Event/Program Guidelines and Third-Party Community Event/Program Application to Legacy. Please mail or email them to:

Legacy Community Health
Attn: Renita Cooksey, Development
P. O. Box 66308
Houston, TX 77266-6308
RCooksey@legacycommunityhealth.org



Third-Party Event/Program Guidelines & Proposal

The above Legacy policies and guidelines have been read and agreed to; I also understand the following:

- I understand that by Texas State Law, raffles are allowed only if sponsored by a 501C3 organization. Legacy is unable to support a third party raffle.
- I agree that Legacy will receive all revenues from the event within 30 days of the event.
- I agree that all printed materials and publicity for the event must be approved by Legacy prior to being released, printed, etc.

Printed Name: _____

Company / Organization: _____

Briefly describe your organization: _____

Address: _____

Phone Number: _____ Email: _____

Full Signature: _____ Date: _____

Legacy Community Health Representatives:

Printed Name: _____ Title: _____

Full Signature: _____ Date: _____

Printed Name: _____ Title: _____

Full Signature: _____ Date: _____



Third-Party Event/Program Guidelines & Proposal

EVENT/PROGRAM INFORMATION SUMMARY

Name of proposed event/program _____

Date of event: _____ Time: _____ to _____

Event Location _____

Anticipated Funds Raised \$ _____ Expenses to be paid? ____ From proceeds ____ By organizer

Anticipated Total Expenses \$ _____

Anticipated Donation to Legacy \$ _____

Social Media Event? _____ Have you formed a committee to help plan this event? _____

Event web-site: _____

Is Legacy the sole beneficiary of this event? _____

EVENT CATEGORIES (check all that apply): One Time Annual On-Going

Seated Dinner Cocktail/Reception Silent Auction Walk/Run Performance

Luncheon Reception Live Auction Sports/Games Fashion Show

Dinner Entertainment Grand Opening Celebrity Drag Show

Breakfast Dance Golf Tournament Keynote Speaker Art Show

Fundraiser Education Other **note: Raffles are not permitted**

Brief description of the event:

CONTACT:

Name: _____ Phone: _____

Address: _____ City: _____ State: _____ Zip _____

Email _____

Approved date: _____ Declined date: _____ Legacy official: _____
Entered into eTapestry (date): _____ eTap record ID: _____ Gift received (date): _____ Amount: \$ _____