



PART OF THE SHEPPARD PRATT HEALTH SYSTEM:



THIRD PARTY EVENT POLICIES AND GUIDELINES

Thank you for your interest in raising funds for Sheppard Pratt Health System. We are grateful to have your support of our mission to improve the quality of life of individuals and families by compassionately serving their mental health, addiction, special education, and community support needs.

To help individuals, organizations, and community groups that would like to host fundraisers to benefit the health system, we have developed the following guidelines.

Please read through this packet. We have tried to answer as many questions as possible, but if you need additional information, don't hesitate to contact us at wenderson@sheppardpratt.org or 410-938-4025.

THANK YOU FOR YOUR SUPPORT!!!

GENERAL INFORMATION

- All fundraising activities for Sheppard Pratt Health System require written permission from Sheppard Pratt Health System Philanthropy Department.
- A **Third-Party Event Proposal Form** must be completed and submitted to Sheppard Pratt Health System's Philanthropy Office at 6501 North Charles Street, Baltimore, MD 21204 at least 2 months prior to the event.
- Sheppard Pratt Health System reserves the right to edit and/or remove any personal fundraising page that does not appropriately reflect the mission of the health system.
- Sheppard Pratt Health System may, for any reason, opt out as the beneficiary of the event or promotion at any time with no obligation.
- Sheppard Pratt Health System must be notified if another organization will benefit from the fundraising activity
- The third-party event organizers are responsible for the planning and execution of the fundraiser, including all set-up, promotion, staffing and/or volunteer and liability. We suggest creating a committee to assist in the planning and execution of the event.
- Sheppard Pratt Health System cannot advance funds or cover any losses that may occur as part of the fundraising activity.

PROMOTIONAL INFORMATION

- When mentioning our name in print, on the air, social media, etc. it should be referred to as "**Sheppard Pratt Health System.**"

- In naming the event or promotion, Sheppard Pratt Health System may not be used in the title but should be listed as a beneficiary of the event. For example, organizers may not refer to the event as the “Sheppard Pratt Health System Celebrity Golf Tournament”; instead, it should be promoted as ‘Celebrity Golf Tournament to benefit Sheppard Pratt Health System.’
- The use of the Sheppard Pratt Health System name and logo(s) requires advance, written permission before any materials (including print and electronic) are produced. All logo use must follow Sheppard Pratt Health System logo standards and is only for use granted for the fundraising activity.

LICENSES & PERMITS

- All events must comply with any and all city, county, state and federal laws.
- Event organizers are responsible for obtaining all applicable permits, licenses and liability waivers, including any required permits for games of chance, including raffles, and the sale/serving of alcohol. Please provide copies of any permits to Sheppard Pratt Health System within 15 days of your event (**Note:** Please check with your county and/or city license and permit office for applicant information and requirements).
- Event organizers must obtain their own liability insurance to cover the event. Sheppard Pratt Health System’s insurance policy does not cover third party events.
- All contracts and permits related to the event must be issued in the name of the organizer and signed by an authorized representative of the organizer. Contracts or permits must not commit Sheppard Pratt Health System (or its partners – Family Services, Mosaic Community Services, Way Station) to any contractual obligations and no representative of the organizer may sign anything on behalf of Sheppard Pratt Health System.

IRS REGULATIONS

- Organizers of the event are responsible for complying with all IRS regulations regarding the fundraiser. IRS regulations governing charitable deductions are quite specific, information can be found at <http://www.irs.gov/charities>.
- Only those donations that are made directly to Sheppard Pratt Health System will be receipted/acknowledged individually. We can provide one acknowledgment for the event coordinator, but IRS regulations do not allow receipts to be given by anyone but Sheppard Pratt Health System staffers.
- Most ticket prices/registration fees for special events are not fully tax deductible (Note: nothing is deductible unless checks are made payable to Sheppard Pratt Health System).
- Raffle ticket purchases are NOT tax deductible. Auction purchases are generally not deductible. Organizers should consult an accountant or tax adviser for further information.

FINANCIAL INFORMATION

- Please limit event expenses to less than 50% of the total raised.
- Sheppard Pratt Health System cannot extend our sales tax exemption to third party event organizers. However, Sheppard Pratt Health System staff can provide a verification letter confirming the organizer’s intent to raise funds.

- Sheppard Pratt cannot provide funding, pay for or reimburse any expenses incurred as a result of a third-party event. This means that the event organizer must pay all expenses prior to remitting the net proceeds to Sheppard Pratt Health System.
- Under no circumstances shall a bank account be set up under Sheppard Pratt Health System's name. If a bank account is needed for the event, the organizers should open a bank account with the event name.
- Event proceeds and an accounting statement must be forwarded within 45 days after the last day of the fundraising event to the Philanthropy Office. A check or money order should be made payable to the "*Sheppard and Enoch Pratt Foundation.*" Again, only those donations that are made out directly to Sheppard Pratt Health System will be receipted/acknowledged individually.
- All checks from participants of third party events and programs, whether they are local or national, should be made out to the third-party organization, not Sheppard Pratt Health System. For individuals requesting donations to Sheppard Pratt Health System in lieu of gifts for a special occasion, checks should be made out directly to the "*Sheppard and Enoch Pratt Foundation.*"
- If you plan to solicit contributions, sponsorships, or in-kind gifts from businesses, individuals or organizations, a complete list must be submitted to and reviewed by the Philanthropy Office before being solicited. Please remember that many individuals, organizations and businesses already support Sheppard Pratt Health System and may not wish to make additional donations. *To protect their privacy, Sheppard Pratt Health System will not be able to provide mailing lists of donors, physicians, employees, volunteers or vendors, nor will we solicit sponsorship revenue for third party fundraising events.*

EVENT STAFFING & REPRESENTATIVES

- Organizers are responsible for recruiting any volunteers needed to work on mailings, publicity, etc., and to actually work at the event. Sheppard Pratt Health System will promote the event at its sole discretion.
- Please request a Sheppard Pratt Health System representative to attend the fundraiser at least two weeks in advance. We cannot guarantee that we can provide a representative.

WHAT CAN WE DO TO HELP YOU?

- If requested, provide a letter of support to be used to validate the authenticity of the event and its organizers.
- Acknowledge any direct contributions to Sheppard Pratt Health System from your fundraising.
- Provide pre-addressed envelopes to make it easier for people to send in donations.
- Promote the event on Sheppard Pratt Health System's social media pages. (However, we are unable to promote your event to other external audiences.)
- Provide existing marketing materials, program collateral and brochures.

PROHIBITIONS

Sheppard Pratt Health System cannot approve events or promotions if they:

- Require endorsement of a product/service or participation in the direct sale of a product/service.

- Involve a professional fundraiser or involve an agreement to raise funds on a commission, bonus or percentage basis.
- Compete or conflict with any established or scheduled event to benefit Sheppard Pratt Health System.
- Involve promotion of a political party, candidate, potential candidate, or public policy position.
- Involve unusual risk that could expose Sheppard Pratt Health System to liability.
- Are contrary to the mission and philosophy of the Sheppard Pratt Health System or reflect negatively upon it.

LIABILITY, CANCELLATION & CHANGES TO YOUR EVENT

- Organizer agrees to indemnify and hold harmless Sheppard Pratt Health System, its Board of Directors and employees from and against any and all losses, damage, costs, attorney’s fees, expenses, and liabilities incurred in connection with or with the defense of, any claim or action or proceeding arising out of or incurred in connection with the fundraising activity.
- Organizer must have adequate proof of insurance; either from the venue holding the event or by purchasing event-day insurance.
- Organizer must advise Sheppard Pratt Health System of any changes made to your fundraising plan after you submit the proposal form.

By signing below, I agree to these policies.

Signature of Event Organizer

Date

Name of Event Organizer (Printed)

Representative
Sheppard Pratt Health System

Date