



Third-Party Event Proposal Guidelines

These guidelines have been prepared for individuals, organizations and other groups interested in planning an event benefiting CHRISTUS Children's. We appreciate your fundraising efforts. This information is provided so there are no misunderstandings or disappointments with regard to our ability to support your event.

- CHRISTUS Children's Foundation must approve events that represent CHRISTUS Children's so as to uphold our mission and image and ensure net proceeds or an acceptable percentage of gross revenue supports our healing ministry.
- The completed event proposal form must be submitted to CHRISTUS Children's Foundation at least 30 days in advance of the event. Please allow CHRISTUS Children's Foundation a minimum of seven days to review.
- All printed materials and other publicity to be published with the CHRISTUS Children's Foundation logo or name must be submitted for review and approval by the Foundation prior to use and distribution.
- All publicity material should clearly state that proceeds benefit CHRISTUS Children's Foundation.
- CHRISTUS Children's, CHRISTUS Children's Foundation, and respective board members are not able to participate in the sale of event tickets or solicit event sponsorships or in-kind donations.
- If an organization plans to solicit contributions, sponsorships or in-kind gifts from businesses, the list of potential sponsors must be submitted for review by CHRISTUS Children's Foundation prior to approaching sponsors. Children's Foundation cannot share its mailing list with any third-party organization.
- Typically, Children's Foundation representatives may be available for the event; however, all requests are considered well in advance of the event.
- All net proceeds must be submitted to CHRISTUS Children's Foundation within 30 calendar days.
- If the proposal is approved, the Children's Foundation, in its sole discretion, may require the fundraising organization to enter into a contract to further define the parties' respective obligations for the event before the event may occur.

Mailed event proposals should be sent to:

CHRISTUS Children's Foundation
Attn: Theo Meyer
P.O. Box 1661
San Antonio, TX 78296-1661

P.O.Box 1661
San Antonio, TX 78296-1661

210.704.2800

ChristusChildrensFoundation.org

Proud member of:



Third-Party Event Proposal Form

To benefit CHRISTUS Children's Foundation

Host/Group/Company Planning this event: _____

Event Contact/Organizer's Name: _____

Address: _____

Email: _____ Phone: ☐ home ☐ mobile ☐ work: _____

Name of proposed event: _____

Event location and address: _____

Date(s) & time(s): _____

This event is: ☐ By invitation only ☐ Open to the Public

Describe proposed event details, purpose, and target audience: _____

Describe any auctions or raffles: _____

Proposed event promotion and publicity: ☐ Press Releases ☐ Fliers ☐ Radio/TV ☐ Billboards ☐ Newspaper

☐ Other: _____

Needed items: ☐ Camera-ready logos ☐ Paper icons (point of sale)

Are there other beneficiaries besides CHRISTUS Children's Foundation? ☐ Yes ☐ No

If so, please note percentage designated to each organization: _____

Do you or anyone in your organization have connections to a

business that will benefit from the event? ☐ Yes ☐ No

If so, please explain: _____

Please estimate: Total income: \$ _____

Total Expenses: \$ _____

Estimated gift to CHRISTUS Children's: \$ _____

Guarantee gift (if promotional event): \$ _____

A guarantee of \$5,000 or more must be made if promotional event, in order for a third-party organization to use the CHRISTUS Children's Foundation logo.

*Please detail anticipated expenses in below with estimate of cost. If you need more space please attach a separate sheet to the proposal. **Event expenses should be appropriate for event type and in no event should exceed 50% of the total raised.***

(continued)

Third-Party Event Proposal Form

Anticipated date of check submission (must be within 30 days of the event): _____

I, _____, agree on behalf of _____ understand the third-party event guidelines supplied by CHRISTUS Children's Foundation on behalf of CHRISTUS Children's and my responsibilities as a third-party event host pertaining to compliance of federal and state laws including, but not limited to, those concerning fundraising events. I promise to abide and adhere to all statements made in the stated guidelines and attest the information provided on this form is correct and accurately describe the proposed event.

Event host/organizer's signature: _____ Date: _____

Please use electronic signature; or print, sign and fax or mail to our office.

CHRISTUS Children's Foundation approval: _____

Please complete and return this form at least one month before your proposed event or project. Only complete forms will be reviewed. Until a confirmation letter is received, contributions should not be solicited and the names CHRISTUS Children's or CHRISTUS Children's Foundation, or any adaptation of, should not be used for any purpose. CHRISTUS Children's Foundation may withdraw approval at any time should we discover inappropriate messaging or behavior associated with the event. The event host will be notified of the approval withdrawal in writing. After approval is withdrawn, all references to CHRISTUS Children's or CHRISTUS Children's Foundation and related departments and programs must be eliminated.

PLEASE RETURN FORM TO:

CHRISTUS Children's Foundation
Attn: Events & Partnership
P.O. Box 1661
San Antonio, TX 78296-1661

By email: theodore.meyer@christushealth.org

Hosting Events

To be used once third party event has been approved

A toolkit for planning events to benefit
CHRISTUS Children's through the
CHRISTUS Children's Foundation.



Thank you!

Thank you for your interest in hosting an event to benefit CHRISTUS Children's through the CHRISTUS Children's Foundation. Please read the following information carefully.

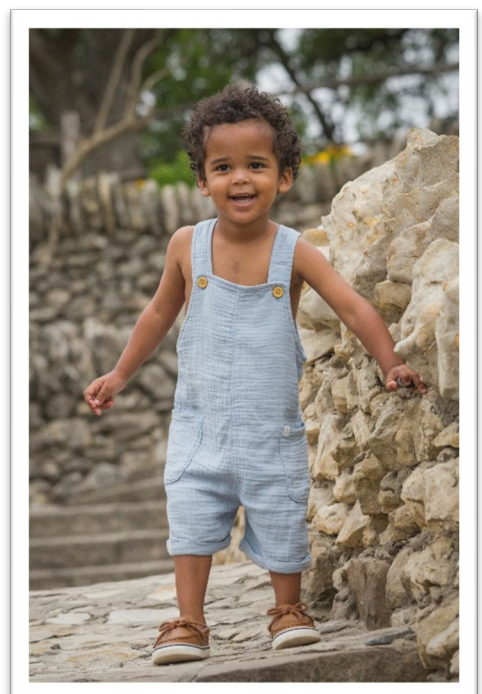
CHRISTUS Children's is able to offer top-quality care in a welcoming environment due, in part, to financial donations from people like you. Your support will help CHRISTUS Children's continue to provide excellent care and treatment for children, as well as offer amenities and support to the entire family.

CHRISTUS Children's Foundation is a non-profit organization that solicits private, tax-deductible contributions for programs and services provided at CHRISTUS Children's. The CHRISTUS Children's Foundation is the preferred channel for private financial contributions that benefit the hospital.

Your third-party event could help support the most urgent needs at CHRISTUS Children's, including expansion and renovation of our facilities, the purchase of advanced medical equipment and technology, and the enhancement of the emotional well-being of our patients and families.

In this toolkit, you will find information about hosting and planning your event, as well as promotional and financial guidelines for CHRISTUS Children's and the CHRISTUS Children's Foundation.

We hope you find this toolkit helpful for planning your event. Please contact us if you have any questions.



Guide to Hosting an Event to Benefit CHRISTUS Children's Foundation

Below are tips to assist you and your committee in planning your event. These tips should be used in addition to the guidelines outlined in this toolkit. Once your event is approved, additional materials will be sent.

First steps

- Evaluate your time and the strengths of your planning committee to determine an appropriate event
- Brainstorm and begin formulating goals

Define event concepts

- Determine the type of event you will be executing
- Determine the planning committee
- Identify event specifics, such as date, time, and location

Gain approval

- Review this entire toolkit, paying special attention to the financial and promotional guidelines
- Submit the third-party event proposal form at least **one month** before your event date

Details

- Create a fundraising plan with a realistic goal and budget
- Establish a timeline to know when important tasks should be completed
- Secure volunteers and participants for your event

Execution

- Promote and publicize your event and/or mail invitations
- Review fundraising plan, budget, timeline, and volunteer/vendor tasks
- Enjoy the event; make sure to congratulate and thank everyone involved

Follow-up

- Submit funds to CHRISTUS Children's Foundation within 30 days of the event
- Acknowledge and thank your donors, participants, volunteers, and all who contributed



How we can help

In order to ensure that your event will be as successful as possible, the team at CHRISTUS Children's Foundation can provide a variety of assistance and services to guide you in your fundraising efforts, from which the resulting donations benefit CHRISTUS Children's. Upon approval of your event proposal, we will generally be able to:

- Offer advice and expertise on event planning and accepting donations
- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Provide permission and promotional requirements for use of CHRISTUS Children's Foundation name and logo (details on page 8)
- Provide a CHRISTUS Children's Foundation flyer template for you to use
- Provide tax receipts to donors who make checks payable to "CHRISTUS Children's" or "CHRISUS Children's Foundation" (when donation is unrelated to receiving something in return)

Third-party responsibilities

Because of our limited staff and resources, and to not associate liability to either CHRISTUS Children's or CHRISTUS Children's Foundation, we are unable to provide support for all fundraising activities. We appreciate your gift of time and talent to help expand our fundraising efforts.

We cannot:

- Handle securing an appropriate venue or other services (e.g. food, entertainment)
- Provide on-site staff or volunteers at fundraising events
- Share CHRISTUS Children's or CHRISTUS Children's Foundation's mailing lists, including donors, board members, physicians, employees, volunteers, vendors, or patients
- Guarantee to promote and/or generate publicity on behalf of your event, nor provide photos to be used on promotional materials
- Provide insurance coverage, permits, or licenses for your event
- Secure sponsorships for your event
- Provide funding for your event
- Guarantee attendance of staff, physicians, or patients at your event(s), including subsequent check presentations or photo opportunities with staff or patients

Disclaimer: CHRISTUS Children's Foundation reserves the right to adjust the contents of this packet to meet the needs of individual event circumstances. Those situations are evaluated internally and done so on a case by case basis. It is expected that unless otherwise approved, all third-party event activities will adhere to the guidelines outlined in this packet

Financial Guidelines

We have prepared the following information to help you understand your role and that of CHRISTUS Children's Foundation as it relates to the financial and tax regulations associated with planning a fundraiser. It is important to know that detailed accounting of event revenues and expenses is important for tax purposes.

Event expenses

As the event organizer, you are responsible for finding sources of funding for the event, if necessary. Third-party expenses will not be processed by CHRISTUS Children's Foundation, including any and all bills associated with the event, and any credit or debit card transactions for the event.

CHRISTUS Children's Foundation expects that event organizers will not keep any portion of the event proceeds as profit or compensation for organizing the event. If event expenses are greater than the revenue generated, CHRISTUS Children's Foundation and CHRISTUS Children's are in no way responsible for those costs.

Event banking

CHRISTUS Children's Foundation cannot serve as a bank for your event. There may be legal and tax implications for any individual who uses his or her personal bank account to process event revenues and expenses. Contact your legal advisor, tax advisor, or bank representative to advise you in this area.

Event taxes

The event is responsible for paying all applicable federal, state, and/or local taxes incurred during the planning and execution of the event.

Federal and state tax exemption

Because neither CHRISTUS Children's Foundation, nor CHRISTUS Children's, is hosting the event, you will not be able to use the tax identification number assigned to these entities.



Financial Guidelines *(continued)*

Donor intent

In order for CHRISTUS Children's Foundation to accept donations from your event, the promotions and solicitations for your event should clearly indicate the donors' intentions—that is, the purpose for which the funds are being raised.

The use of the “proceeds benefit” logos shown on Page 8 clearly indicates the purpose. In text, we recommend this statement: ***“Proceeds from this event will benefit CHRISTUS Children's Foundation.”***

Tax treatment of donations

Your event staff or committee is responsible for collecting all gift funds generated. Only checks made out directly to CHRISTUS Children's Foundation and/or CHRISTUS Children's may be classified as gifts to the Foundation. In this case, the Foundation will provide receipts for each check to the check issuers.

However, certain types of donations are not gifts to the Foundation, including:

- Payments to the event organizers for event participation, such as “entrance fees” or “suggested donations”
- Payments made by individuals that are used to defray event costs
- In-kind donations to your event (certain businesses may be able to treat such donations as business expenses in accordance with their own obligations)

Auctions, raffles, etc.

If your event includes an auction, raffle, or similar gambling activity, please clearly state that intent in the “event details” section of the proposal form. Careful consideration must be given to these activities, which may require state-specific licenses and other compliance steps.

Submitting net proceeds

To make a contribution to CHRISTUS Children's from your event proceeds, please make the check payable to:
CHRISTUS Children's Foundation
and mail to:

CHRISTUS Children's Foundation
Attn: Events & Partnerships
P.O. Box 1661
San Antonio, TX 78296-1661

A receipt will be provided to the check issuer.



Promotional Requirements

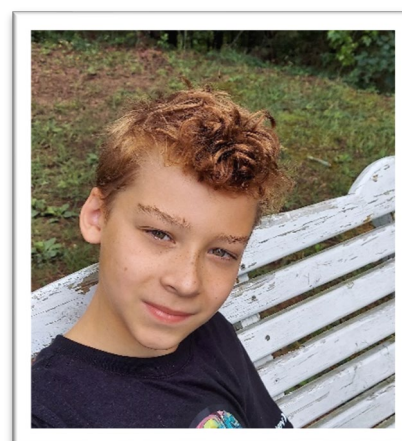
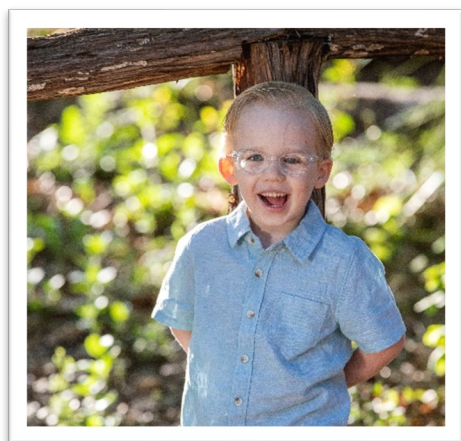
CHRISTUS Children's and CHRISTUS Children's Foundation brands are important to all of us. We take pride in our brand images and work hard to ensure the messaging connected to it is positive and consistent, because it reflects on the important work of our physicians, researchers, faculty, and staff.

As a volunteer third-party event host/organizer, you assume the responsibilities of adhering to CHRISTUS Children's and CHRISTUS Children's Foundation brand policies.

Upon approval of your event, CHRISTUS Children's Foundation can supply the third-party event organizers promotional items, such as logos, flyer templates, etc. to help advertise and market the event.

These guidelines include the following key points:

- All promotional materials should state that proceeds will benefit CHRISTUS Children's Foundation and in no way suggest CHRISTUS Children's or CHRISTUS Children's Foundation are in any way responsible for the event.
- CHRISTUS Children's and CHRISTUS Children's Foundation reserve the right to review all promotional materials and make changes in messaging to ensure that the language is consistent with branding guidelines.



Logo Options

The logos on this page are those available for use by approved third-party events. The logos are to be used as is and cannot be altered in any way. The logos shown below are the only logos available for use by third-party events. All materials using the CHRISTUS Children's Foundation logo must be reviewed and approved prior to use.

Determine your logo needs for your promotional materials. You will be able to request specific logos on the proposal form. Once your event is approved, you will receive the requested logos in addition to the detailed promotional guide. The logos provided below and others in this toolkit may not be copied or otherwise used.

Proceeds Benefit:



Proceeds Benefit:



Proceeds Benefit:



Proceeds Benefit:

