



Guidelines for Third Party Events/Fundraisers

The Foundation of the Pennsylvania Medical Society (“the Foundation”) appreciates your fundraising efforts on behalf of our organization. Your support will help the Foundation reach our mission to provide programs and services for individual physicians and others that improve the well-being of Pennsylvanians and sustain the future of medicine. We are fortunate to receive inquiries from individuals, families, companies, and organizations that would like to support us. Please review the following guidelines to ensure that your event is successful and meets the goals and objectives of our nonprofit organization.

***Third Party Events Definition:** An event hosted by an entity on behalf of another organization. The Foundation defines a 3rd party fundraiser as a fundraising activity by a group or individual other than the Foundation, where proceeds are designated to one of our funds where the Foundation is the beneficiary.

*The Foundation of the Pennsylvania Medical Society is a charitable nonprofit 501(c)3 tax-exempt organization that complies with federal and state requirements and generally accepted accounting practices, which are consistent with our policies and procedures regarding fundraising events. The following rules and guidelines will help ensure that 3rd party fundraisers comply with these practices.

*Guidelines for hosts of 3rd party events/fundraisers:

1. The Foundation can help your event by providing the following:

- Small Games of Chance License available (for qualifying events).
- The Foundation of the Pennsylvania Medical Society Logo for printed literature – use of this logo is restricted and limited to use for event. (Any printed materials where the logo appears must be reviewed and approved by the Foundation.)
- Foundation produced literature/materials including brochures, pamphlets and other materials as needed.
- The Foundation, or one of our funds, may be identified as a beneficiary of the event, for example “Jeans Day fundraiser to benefit the Pennsylvania Nurses’ Health Program (PA NHP) Assistance Fund at the Foundation of the Pennsylvania Medical Society.”
- In many cases, cross-posting of the event on the Foundation’s website, social media accounts, or facility locations, may be arranged through our Philanthropy Department with 3rd party’s contact information.
- Foundation Board of Directors, staff and volunteers will be notified of the event.



2. Foundation staff may be able to provide, but cannot guarantee the following:

- A Foundation representative to set up a table at the event in order to answer questions and provide information about the Foundation or our Funds Program.
- Small giveaways, if available (pens, magnets, etc.).
- A speaker at the event.
- A check/donation presentation at an event or at a designated venue and time after the event.

3. For legal and The Foundation of the Pennsylvania Medical Society purposes, the Foundation cannot perform the following functions or activities for events it does not directly sponsor/host:

- Provide on-site staff or volunteers to work at your event other than at the Foundation's information table.
- Provide mailing lists of donors, employees, prospects, or volunteers.
- Provide insurance coverage or secure permits for 3rd party events.
- Issue receipts for donations not made directly to the Foundation.
- Extend our tax exemption to a 3rd party host.
- Extend our tax ID number for purchases.
- Provide Foundation letterhead for 3rd party use.
- Direct solicitation by the Foundation staff or its volunteers, including but not limited to: door-to-door canvassing, telemarketing or internet marketing.
- Provide automated auction systems or services.
- Promote any political parties or candidates.
- Participate in programs that raise money on commission.

4. Organizer Responsibilities:

- All 3rd party fundraisers must comply with all applicable local, state, and federal laws.
- Upon Foundation approval of 3rd party fundraising event, the Foundation must be notified of any significant changes to events, and the Foundation has the right to disassociate with a 3rd party event at any time if guidelines are not followed or any activity at the event does not meet the Foundation mission and values. This is subject to reasonable discretion by Foundation management or Foundation leadership.
- The Foundation prefers at least three months notification in advance of the 3rd party event date.



The Foundation
of the Pennsylvania Medical Society
Education. Wellness. Excellence. Always.

- All 3rd party fundraising events must be financially self-sustaining, without contribution from, or financial risk to the Foundation. Any expenses incurred by the event are the responsibility of the event organizers.
- The Foundation has no legal obligation to 3rd party events and assumes no liability for the planning or execution, including promotion, set-up, staffing (including volunteers), or the collection and management of funds and donations.

***Indemnification Clause:** All 3rd party event sponsors/hosts agree to indemnify The Foundation of the Pennsylvania Medical Society, its directors, officers and employees from, and against, all claims and liabilities that may arise from any acts or omissions of 3rd party agents, volunteers or employees, or from any claim by the 3rd party relating to the quality, performance or failure to perform during the specified time period of the event.

By signing here, you understand and agree to abide by our guidelines.

For more information please contact:
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(Event Organizer)

(Foundation Executive Director)

(Date)

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Gifts to the Foundation are tax-deductible to the fullest extent allowed by law and will be acknowledged as such. The official registration and financial information of The Foundation of the Pennsylvania Medical Society may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

