



Third Party Event Guidelines

Overview

The TGen Foundation is honored to be the beneficiary of financial support resulting from fundraising events organized by individuals and groups within the community who are committed to advancing TGen's mission. We appreciate your efforts to help TGen rapidly move scientific discoveries from the research bench to the patient's bedside. All proceeds from your event will benefit translational research at TGen. The donation can also be specified to the disease interest of your choice.

The TGen Foundation is a 501(c)(3) charitable organization with tax ID number 33-1092191. All contributions made directly to the TGen Foundation are tax deductible as allowed by law.

Members of the TGen Foundation Events team look forward to working with you to offer assistance as you plan and hold your fundraising event.

Our Commitment

The TGen Foundation is committed to provide the following support for the event subject to the requirements below:

- Logo
- Endorsement letter
- TGen brochures and collateral materials
- Announcement on TGen Foundation website
- Tax receipts for donations made payable directly to the TGen Foundation
- A representative from TGen or the TGen Foundation, depending on location and staff availability

Your Commitment

The organizers of events benefitting the TGen Foundation are responsible for the following items:

- Completion and submission of the event application
- All costs and expenses associated with the event
- Registrations, licenses and permits (i.e., liquor, raffle, etc.)
- Certificate of liability insurance with TGen and the TGen Foundation as additional insureds upon request
- Compliance with all federal, state and local laws
- Clear disclosure of the percentage of the donation to be given to TGen
- Planning and execution of the event, including all set-up, promotion, staffing and/or volunteers.



Best Practices

1. Form a planning committee: The enthusiasm and dedication of the people who help you plan and organize your activity will increase its success. Your committee should have enough members to share the work and represent a variety of skills.
2. Establish goals: Have realistic and measurable financial goals.
3. Evaluate the choice of activity: Your event or promotion should fit the size, interest, talents, goals and time availability of your group.
4. Identify your audience: Who is most likely to attend and support the type of activity you have selected?
5. Develop a budget: Identify possible sources of income and all expenses. Keeping your up-front costs down by identifying underwriting opportunities will ensure a larger contribution to the charity and result in satisfied guests. Your costs should not be more than 20% of your target fundraising goal.
6. Promote and publicize: Promoting and publicizing your activity will be key in reaching your target audience and overall goal. Social media is one of the best ways to engage your audience. Invite people to like your posting and repost on Facebook or reTweet through their Twitter account.

Event Logistics

Legal

- TGen and the TGen Foundation will not be held liable for any financial losses incurred in connection with the event. The event organizer (identified in the signature block below) will indemnify, defend and hold TGen, TGen Foundation and their respective officers, directors, employees and agents harmless from all claims, causes of action, liabilities and damages ("Losses") of any kind (including, without limitation, reasonable attorneys' fees) arising out of or in connection with the event, including but not limited to Losses arising out of or in connection with property damage or personal injury.
- The TGen Foundation retains the right to approve any and all use of its name and logo and to ensure that TGen's name, symbols and marks are being used properly, that all funds are being handled and accounted for in a reasonable manner, and that the fundraising event is being conducted in a manner that is consistent with the TGen's mission and public image.
- All third party fundraising events require written permission from the TGen Foundation in advance. There may not be any public announcements to promote the event until approval is received for the event proposal. The TGen Foundation will make every reasonable effort to review and respond to each proposal within three (3) business days of receiving the request.
- Fundraising events must comply with all relevant local, state and federal laws.
- The TGen Foundation reserves the right to decline or end association at any time with any person or organization when it believes that such association may have a negative effect on the image of TGen or is not in compliance with its requirements.
- The TGen Foundation reserves the right to decline approval of an event if other nonprofit organizations are beneficiaries and/or involved in the event without mutual compliance.



Promotion and Use of Logo

- All third party events must be promoted and conducted in a manner that avoids any direct or implied statement or appearance that: (a) TGen or the TGen Foundation is endorsing any product, firm, organization, or service; or (b) that TGen or the TGen Foundation is itself conducting the event.
- The TGen Foundation must review and approve all promotional materials prior to production or distribution, including but not limited to, press releases, invitations, brochures, letters and flyers.
- TGen is a registered trademark. TGen and the TGen Foundation names and logos must be used appropriately in conjunction with the event and must not be altered in any way.
- The TGen Foundation may choose to announce the event, when appropriate, through the following media:
 - TGen Foundation website
 - TGen's newsletter, *TGen Today*
 - TGen Foundation social media tools
- Any promotional materials must clearly state that the event is raising funds to benefit the TGen Foundation.
- The TGen Foundation is not obligated but may be able to assist in collecting registrations online and through the mail using the existing infrastructure.

Sponsorship

- The TGen Foundation is not obligated to solicit sponsors for any fundraising event.
- The TGen Foundation does not provide any donor or volunteer contact information.
- The TGen Foundation requests a list of all targeted sponsors (both for cash and product / service donations) for the event before the sponsors are contacted, so that the TGen Foundation can provide you with information on their current support and minimize overlap with other TGen Foundation sponsors.

Financial Guidelines

- The TGen Foundation disburses 95 percent of all contributed funds to TGen and the designated area of research. Five percent of all donations is used for administrative expenses incurred at the TGen Foundation. This information must be disclosed on all promotional material used in connection with the event.
- The TGen Foundation sales tax-exemption on purchases cannot be extended to any third party event or fundraising effort.
- All donations should be made payable to the TGen Foundation and sent to the following address:

TGen Foundation
445 N. 5th Street, Suite 120
Phoenix, AZ 85004



Next Steps:

1. Review the Fundraising Guidelines
2. Complete the Application Form
3. Submit the application to the TGen Foundation

TGen Foundation
445 N. 5th Street, Suite 120
Phoenix, AZ 85004

The TGen Foundation will evaluate your proposal using the following questions to determine the event's appropriateness and benefit to TGen.

1. Does the activity support the mission and image of TGen?
2. Does the activity have a viable target audience and accessible location?
3. Does the activity have a realistic budget, plan and volunteer base?
4. What type of support or involvement is being requested of the TGen Foundation personnel?
5. What percentage of the proceeds or minimum donation will be directed to a TGen facility, program, or service?

On behalf of all of us at the TGen Foundation, we would like to thank you again for your interest in supporting cutting edge research that is benefitting patients right now.