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HelpHOPELive.org
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REGIONAL RESTRICTED FUND PROCEDURES

1. A local volunteer or group will conduct actual grass-roots fundraising. This type of fundraising is successful because of personal contacts – neighbors, co-workers, family and friends, etc. HelpHOPELive™ will advise and serve as a consultant to the volunteer/group, providing ideas, materials, resources, guidelines and support. **All fundraising activities and printed materials must be approved by a HelpHOPELive Patient Services Coordinator.**
2. Soliciting corporations and foundations for donations without a personal connection is generally unsuccessful. HelpHOPELive must give prior approval before such solicitation.
3. Funds raised are sent to and held by HelpHOPELive in Regional Restricted Funds. Funds are controlled and administered by HelpHOPELive and are disbursed upon application and demonstration of financial need. These funds allow patients to access health care and pay for uninsured medically related expenses. HelpHOPELive maintains audited financial records*, assuring fiscal accountability for money received and disbursed.
4. **All checks should be made out to HelpHOPELive with the memo section noting: “In Honor of (patient name)”**
5. “Money” must be in U.S. currency and may include any cash, check, credit card contribution or other negotiable security donated to the Regional Restricted Fund in honor of the patient by an individual or business.
6. HelpHOPELive will provide a list of contributors weekly in the Patient Restricted Area of our website. Hard copies will be available upon request. HelpHOPELive adheres to the Donor’s Bill of Rights, which precludes us from disclosing the amounts contributed by individuals.
7. A contributor’s canceled check serves as a gift acknowledgement for tax purposes. HelpHOPELive will send a letter of acknowledgement for contributions of \$250 or more, and to those contributors of less than \$250 upon request from the contributor. Contributors should be encouraged to retain copies of their Tribute Gift Forms for tax purposes.
8. Generally, contributions to HelpHOPELive are tax deductible to the contributor. Gifts-in-kind are tax deductible only if given as part of a fundraising event (e.g.: dinner dance, auction, etc.). Gifts of money or goods and services given directly to the patient are not tax deductible. Contributors should speak to a tax expert if they have questions regarding tax deductibility.
9. HelpHOPELive will use Regional Restricted Funds to pay for catastrophic injury-related medical expenses of its patients according to financial need and region. **With limited exceptions, expenses are paid exclusively to the service provider.** See *Sample Expenses on page 2.*

* Our 990 lists us by our legal name, which is National Transplant Assistance Fund, Inc.

Sample Expenses:

- Hospital and doctor bills;
- Health insurance and COBRA premiums, to the insurance carrier, for the patient;
- Medications, treatments and home medical supplies/equipment, and home care;
- Home and vehicle modifications;
- Expenses for experimental therapy;
- Medically related travel expenses, including mileage reimbursement (IRS medical rate), tolls and parking;
- Hardship payment up to \$1,500 per month for three months for a patient or family member temporarily unable to work as a result of a catastrophic injury. Paid upon receipt of appropriate backup documentation.

10. Critical information for payment of injury-related expenses:

- A HelpHOPELive Fund Request Form is needed for all requests.
- All requests must be accompanied by appropriate invoices, directing payment or, in limited instances, reimbursement.
- When requesting reimbursement, proof of payment must be provided (e.g., canceled check, paid invoice, etc.).
- Fund Request Forms must be mailed (not faxed) to arrive at HelpHOPELive by Tuesday for payment by the end of the business week.
- Due to volume of weekly disbursements, HelpHOPELive is unable to honor special mail requests requiring express service.
- HelpHOPELive has no obligation to pay more expenses than it has money available in a specified Regional Restricted Fund.
- All disbursements are made subject to the approval of HelpHOPELive and reviewed by its board of directors.

11. Fund requests of \$20,000 or more must be payable to the vendor, and must be pre-approved by the HelpHOPELive Financial Department. The Fund Request Form must have an invoice from the vendor for the amount requested.

13. It is the patient's responsibility to inform HelpHOPELive of any change of contact information. Campaigns in which there has been no activity (income or disbursements) or contact for three years will be deemed "inactive." After attempts to contact the family have been made, remaining funds will be used to expand HelpHOPELive's ability to serve.

14. In the event of a patient's death, memorial contributions may be directed to the HelpHOPELive Regional Fund in memory of the patient. Contributions to memorialize a loved one (in lieu of flowers) may be accepted in a patient's honor.

15. Any authorized person may submit requests for payment of expenses for six months after the passing of a patient. Burial expenses can be submitted. Six months after the patient's death, the Board of HelpHOPELive has the discretion to authorize the transfer of remaining funds to assist other injured individuals or expand HelpHOPELive's ability to serve. This time frame can be extended if the family contacts HelpHOPELive.

16. In order to help cover the administrative costs (patient services, mailings, telephones, technology, personalized printed materials for patients, supplies, state registrations, audits, accounting, etc.) a 4% fee will be taken from incoming donations with the remaining 96% available for the patient's medically related expenses. The administrative fee is slightly higher for credit card contributions (7%), corporate matching gifts or foundation grants (10%) due to higher administrative costs.

17. Expenses associated with returned checks and disputed credit card fees will be charged to the Regional Restricted Fund.

18. HelpHOPELive retains the right to utilize income and capital appreciation earned by Regional Restricted Funds to offset administrative costs, and help other individuals with catastrophic injuries raise funds and awareness.
19. Fundraising costs incurred by local volunteer groups can be reimbursed upon the patient's submission of a Fund Request Form. Such costs should be kept to a minimum since the purpose of the campaign is to assist patients with their catastrophic injury related expenses. HelpHOPELive has no legal or financial responsibility to pay expenses incurred by volunteers. HelpHOPELive will not pay for services provided by paid professional fundraisers or for legal services.
20. It is the responsibility of fundraising volunteers and event sponsors to obtain insurance coverage and licenses when necessary, as well as to comply with the legal and tax ramifications of certain events such as raffles and auctions. HelpHOPELive can give guidance as to the types of events that typically have tax implications but does not give legal or tax advice. At no time can any volunteer act as an agent on behalf of HelpHOPELive or otherwise bind the organization legally.
21. As a 501(c)(3) nonprofit organization, HelpHOPELive (legal name: National Transplant Assistance Fund, Inc.) retains exclusive legal control over the Regional Restricted Funds including the administration, management and disbursement of such funds in accordance with our guidelines.