Program Overview
As one of the nation's leading health care providers and nonprofit health plans, Kaiser Permanente is helping shape the future of health care by providing high-quality, affordable health care services to improve the health of our members and the communities we serve.

Eligibility
To be eligible for an event sponsorship, an applicant organization must operate currently in California as one of these types of organizations:
- 501(c)(3) tax-exempt organization with a 509(a) designation indicating that the organization is not a private foundation
- 501(c)(19)
- 501(c)(8) or 501(c)(10) operating under a lodge system, and only if used solely for charitable purposes and serving the general community
- A local, state, or federal government agency, including any of its subdivisions that perform substantial governmental functions
- 501(c)(4), 501(c)(5), 501(c)(6), or 501(c)(7)

Funding Restrictions
In general, the Kaiser Permanente Southern California Event Sponsorship Program will not consider funding requests from international, social, or recreational clubs, or for the following:
- Sports teams and tournaments (e.g., golf, tennis)
- Individuals
- Religious purposes
- Partisan political activities
- Endowments or memorials
- Walks or runs

Application Attachments
Please Note: You must include all supporting documents with application to be considered for funding.
- Completed application (attached)
- A copy of your organization’s tax-exempt status documentation* (see the next page for other acceptable documents)
- A list of your organization’s board members or governing body and their affiliations*
- If a fiscal agent is used, a letter from the fiscal agent organization on the fiscal agent’s letterhead and signed by the executive director/chief executive officer that confirms and explains the relationship between the two entities
- List of sponsorship levels and associated benefits on the organization’s letterhead
- Completed W-9 (Request for Taxpayer Identification Number and Certification)

To be considered for an event sponsorship above $20,000, see page 2 for additional required documents.*

*If your organization uses a fiscal agent, this information should be from the fiscal agent organization.

Please Note: Completing this application does not guarantee funding for your event sponsorship request.
Tax-exempt Status Documentation
The following are acceptable documents for determining an organization’s tax exempt status.

I. **Public charities**
   - A current copy of the tax exemption status letter from the Internal Revenue Service; or
   - A copy of certification from the Office of the State Attorney General; or
   - If an institution has recently applied for a 501(c)(3) status, a copy of the advanced ruling determination period that has not expired AND a copy of their Form 1023 – Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code.

II. **Government entities or public universities**
   - A copy of the organization’s current tax exempt determination letter from the Internal Revenue Service; or
   - A letter from the Chief Financial Officer or a Certified Public Accounting Firm, indicating that the government agency has been granted tax exemption; or
   - A copy of the statute or enabling legislation establishing the organization.

III. **Cities or counties**
   - A copy of the organization’s current tax exempt determination letter from the Internal Revenue Service; or
   - A letter from the Chief Financial Officer or a Certified Public Accounting Firm, indicating that the government agency has been granted tax exemption; or
   - A copy of the county or city statute, or enabling legislation establishing the organization.

IV. **Private schools or universities**
   - A copy of the organization’s current tax exempt determination letter from the Internal Revenue Service; or
   - A copy of the parent organization’s current tax exempt determination letter.

V. **Organizations that are relying on a group ruling**
   - A copy of the parent organization’s current tax exempt determination letter or final determination letter with the exact name under which the parent organization obtained its group ruling; or
   - A copy of the parent organization’s current letter to the IRS listing all of the subordinate organizations in the group ruling.

**Requests above $20,000**
The following are additional required documents for requests above $20,000:

1. **IRS Form 990**
   Please attach a copy of your organization's most recent IRS Form 990. (Not required of government entities.)

2. **Audited Financial Statement**
   Please attach a copy of your most recent independent audited financial statement. Government entities may attach a Comprehensive Annual Financial Report (CAFR).

3. **Organization Budget**
   Please attach a copy of your organization's current annual itemized operating budget.
# Event Sponsorship Application

## Organization Profile

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Fed Tax ID Number</th>
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</thead>
<tbody>
<tr>
<td>Organization Legal Name</td>
<td>Tax Exemption Status</td>
</tr>
<tr>
<td>Physical Address</td>
<td>City</td>
</tr>
<tr>
<td>Phone</td>
<td>Fax</td>
</tr>
<tr>
<td>Chief Executive</td>
<td>Prefix</td>
</tr>
<tr>
<td>Event Contact Person</td>
<td>Title</td>
</tr>
<tr>
<td>Phone</td>
<td>Fax</td>
</tr>
<tr>
<td>Total Current Annual Operating Budget</td>
<td>Year Organization Established</td>
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<tr>
<td>Organization Mission (Two (2) sentences maximum)</td>
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</tbody>
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## Fiscal Agent Information (if different from above)

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<th>Organization Name</th>
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</tbody>
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## Event Information

| Event/Project Name | |
|-------------------| |
| Event Location | Event Date(s) |
| Requested Amount | Event/Project Budget |
| Type of Event (e.g., Luncheon) | Number of Expected Attendees |
| Event Description (What is the focus of the event and event activities? How will our sponsorship dollars be spent? How will the success of the event be measured? How will it benefit the community?) | |

## Sponsorship Benefits

| Fair Market Value of Tangible Benefit Items, If Applicable | |
| Speaking Opportunity | Yes | No | |
| Exhibit Opportunity | Yes | No | |
| Event Sponsorship Inclusions (e.g., Meal, Journal Ad) | |
| Printed Materials Deadline (e.g., Invitation, Program Book) | |
**Attestation**

Does your organization have a policy against discrimination on the basis of sex, age, economic status, educational background, race, color, ancestry, national origin, sexual orientation, gender expression, gender identity, or marital status?

- Requesting organization: [ ] Yes  [ ] No
- Fiscal agent (if applicable): [ ] Yes  [ ] No

Is your organization named for or financed by a Member of Congress or Executive Branch Official?

- Requesting organization: [ ] Yes  [ ] No
- Fiscal agent (if applicable): [ ] Yes  [ ] No

Does a Member of Congress, Executive Branch Official, State Official, or their staff hold a position on your organization’s board of directors?

- Requesting organization: [ ] Yes  [ ] No
- Fiscal agent (if applicable): [ ] Yes  [ ] No

Does your organization have a political action committee (PAC) or committee on political education (COPE)?

- Requesting organization: [ ] Yes  [ ] No
- Fiscal agent (if applicable): [ ] Yes  [ ] No

For a religious or faith-based organization, will the proceeds be used to support general operations, services and programs of the congregation/membership/students, or to advance religious doctrine or philosophy?

- Requesting organization: [ ] Yes  [ ] No  [ ] Not applicable
- Fiscal agent (if applicable): [ ] Yes  [ ] No  [ ] Not applicable

**Kaiser Permanente asks each organization requesting a contribution to disclose any relationships with Kaiser Permanente that may be, or appear to be, a conflict of interest. Such relationships may not create actual conflicts of interest and do not necessarily prohibit your organization from receiving a contribution. However, they must be disclosed in order for Kaiser Permanente to complete its due diligence.**

Do any Kaiser Permanente executives, managers, directors, physicians, or other employees or their family members:

- Serve as a board member, director, officer, manager, employee or fiduciary agent of your organization;
- Have a compensation arrangement or financial interest with your organization; or
- Hold any position of substantial influence with respect to your organization?

- Requesting organization: [ ] Yes  [ ] No
- Fiscal agent (if applicable): [ ] Yes  [ ] No

If **Yes**, state the name of the Kaiser Permanente employee or their family member and describe the nature of the relationship with your organization:

**Please Note:** If you are unaware of any relationship at this time but become aware of one during the application process or grant period we ask that you still disclose the relationship by contacting so.cal.events@kp.org.

**Submission Information**

By E-mail: Gail.D.Koretz@kp.org with the subject line: **Event Sponsorship Application – [Your Organization’s Name]**

By Mail: Kaiser Permanente, Public Affairs, 4841 Hollywood Blvd. Los Angeles, CA 90027

**NOTE:** Potential sponsorship opportunities should be submitted a minimum of 90 days prior to the event in order to allow sufficient time to consider a request.