



# Balance Health & Injury Clinic, PC

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Acupuncture ♦ Chiropractic ♦ Massage ♦ Rehabilitation

## Charitable Contributions and Sponsorship Policy

As a member of the Gresham and great Portland area business community, Balance Health & Injury Clinic's (Balance) social responsibility is to support local, nonprofit community organizations by providing financial contributions, in-kind services, and volunteer support. In keeping with our corporate mission, we aim to increase access to acupuncture and chiropractic healthcare and education for the uninsured by strengthening our bond with the community and addressing the needs of the people of Gresham, particularly the uninsured, underinsured, and most vulnerable.

The Charitable Contributions and Sponsorship Policy ensures that all Balance donations, sponsorships, company volunteer activities, and in-kind services are coordinated and aligned with our corporate social responsibility strategy and business goals, maximize opportunity for corporate visibility, foster long-term business relationships, and are within our budget and resource limitations. This policy eliminates duplication and establishes a central point of contact for internal and external requests. All corporate expenditures for charitable donations, sponsorships, fundraising events, recognition dinners, tee signs, golf tournaments, program booklet ads, etc. will be handled accordingly.

- All incoming and outgoing requests for charitable contributions/sponsorships, in-kind services or support, and/or company volunteer support, or business courtesies will be coordinated and administered by the Clinic Director. Individual employees may not respond to requests from (or solicit from) individuals or organizations that have an actual or potential business relationship with our company.
- Incoming or outgoing requests for sponsorships, charitable donations, volunteers, in-kind services, gifts or giveaways, or business courtesies must be made in writing and forwarded to the Clinic Director for research, review, and final disposition no less than five weeks before the desired delivery date. The Clinic Director will communicate directly with agencies regarding all requests and coordinate any follow up documentation, and/or collateral activities such as ads, tickets, invitations, banners, etc.

The following guidelines will be used in reviewing requests for charitable contributions and sponsorships and company volunteer initiatives:

- Only Gresham and greater Portland area-based, 501(c)(3) nonprofit organizations, 501(c)(4) social welfare organizations, and 501(c)(6) business leagues will be considered for charitable contributions, sponsorships, volunteer support, or in-kind donations;
- All corporate charitable contributions, sponsorships, and in-kind services will promote our business goals, create positive visibility, and demonstrate social responsibility;
- The major recipients of charitable resources and funding must go to the Gresham, east county, and greater Portland area;
- The major focus of our contributions will be on health-related causes, the uninsured, and support of other corporate priorities. Contributions will be coordinated with employee volunteer activities when possible to achieve maximum impact within budget guidelines;
- We will also consider requests to support social, community, civic, educational, diversity, and economic endeavors if these support corporate business goals and meet contribution guidelines and/or if Balance staff is involved in the governance of the organization;
- All requests will be entered into the Balance charitable contributions database no less than five weeks prior to desired delivery by the Executive Assistant and reviewed with formal recommendation by the Clinic Director, and may also include Owners, Marketing Team, and the Legal Department.



The following exclusions apply:

- Balance will not support organizations that discriminate on the basis of age, sex, race, religion, national origin, sexual orientation, or disability with respect to employment, volunteer participation, or the provision of services;
- Contributions to organizations who focus their time, energy, and resources outside of the Gresham, east county, greater Portland area will not be considered;
- Contributions will be made only to the qualifying nonprofit agency. Contributions will not be made to organizations conducting fundraising (third party giving) on behalf of nonprofit agencies;
- Requests from religious organizations for sectarian purposes will not be considered; however, a community program sponsored by a religious organization will be considered (e.g., food pantry), housing for families, etc.;
- Requests from all local, regional, and/or school-based sports teams will not be considered, unless there is a strong Balance connection to said sports team;
- Requests from individual Oregon elementary or secondary schools (public or private) will not be considered, unless the request is for a new and innovative program specifically designed to address health and wellness;
- Requests that solicit financial support for individuals, political candidates, and political campaigns, or entities that are not nonprofit organizations, will not be considered;
- Financial requests for capital campaigns will not be considered.

**Charitable Donation Worksheet**

- YES  **NO** Is the organization’s primary beneficiary Gresham, east-county, or the greater Portland area?<sup>1</sup>
- YES  NO Is this a Gresham, east-county, or greater Portland area based organization?
- YES  NO Is the organization a 501(c)(3), 501(c)(4), or 501(c)(6)?
- YES Is this a request for support of social, community, civic, educational, diversity, and economic endeavors?
- YES Is this a request from a local sports team? Balance connection: \_\_\_\_\_

Name of Contact: \_\_\_\_\_ eMail: \_\_\_\_\_

Name of Organization: \_\_\_\_\_ Phone: \_\_\_\_\_

Organization Address: \_\_\_\_\_

Organization website: \_\_\_\_\_ Tax ID: \_\_\_\_\_

Date of Request: \_\_\_\_\_ Desired Delivery Date: \_\_\_\_\_

Donation Request: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<sup>1</sup>A “no” response on this question automatically disqualifies this organization for charitable donation from Balance.

