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## **CALIFORNIA TRANSPORTATION FOUNDATION**

### **INJURED AND FALLEN WORKER (I&F) FUND POLICY**

The California Transportation Foundation's (CTF) Injured and Fallen Worker (I&F) Fund program was established to help California transportation industry (private or public sector) employees and their families who are in need of financial assistance because of death, medical conditions, and disaster losses to a California transportation employee. The program consists of a permanent I&F Fund, temporary I&F Fund accounts established to raise money for a specific need, and the Fallen Worker Program.

The establishment and maintenance of temporary I&F Fund accounts by CTF furthers CTF's tax-exempt purpose of providing support to persons within transportation related fields. All amounts received into a temporary I&F Fund account are held by CTF on behalf of the intended beneficiary and are not owned by CTF. CTF provides an accounting of contributions to each temporary I&F Fund account to the designated contact person. Amounts contributed to a temporary I&F Fund are not tax-deductible contributions except in the case of disaster losses when contributions may be tax-deductible if beneficiaries and distribution are initially individually not determinable.

The following conditions apply to the I&F Fund program:

1. If the injury, loss or death occurs to a transportation industry employee while on the job, then CTF will administer the temporary I&F account and make a matching contribution from CTF's permanent I&F Fund. In no case will the total amount of matching funds provided by CTF exceed \$7,500 not including funds from a Fallen Worker grant.
2. When a transportation industry employee dies accidentally in the line of duty, she/he may also be eligible for a Fallen Worker grant. These grants may be used to defray immediate expenses, up to \$2,500, not covered by ordinary death benefits. Examples include, but are not limited to, memorial ribbons for funeral attendees, flowers and/or refreshments at the funeral, travel costs to bring loved ones to the survivors' side. Fallen Worker grants are made entirely from the permanent I&F Fund. No matching contributions are required.

3. If the injury, loss or death occurs directly to a transportation industry employee while not on the job, then CTF will administer the temporary I&F Fund account but NOT make a matching contribution.
4. If the injury, loss or death is not one described above CTF will not participate in any way.
5. CTF will not match donations received from the person, trust or entity who is the beneficiary or receiver/trustee of person who passed away.
6. CTF will determine when the account will be closed.

In order to establish a temporary I&F Fund, the requesting party shall provide CTF the following information on the I&F Request Form on Page 2.

Revisions Adopted September 23, and December 11, 2019



# Injured and Fallen Worker (I&F) Fund Request Form

Email the Completed Request to [sarah.west@transportationfoundation.org](mailto:sarah.west@transportationfoundation.org)

Fund Name: \_\_\_\_\_

Fund Purpose: A brief description of the purpose or need for the fund.

Briefly describe what happened. Was injury or death work related? Yes  No

## Designated Contact Person's Information (Person we may direct questions to)

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Checks from this Fund Should Be Made Payable to

Name: \_\_\_\_\_

Mailing Address to Send Checks: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Requestor's (Work Supervisor's) Information

### Requestor's

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization (If Caltrans, which district): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Photos:** May CTF use a provided photo of the injured or fallen worker in our printed materials and announcements to help raise funds for the Injured & Fallen Worker Fund? (check box) Yes  No

## Please Read and Sign Disclosure Statement:

I understand that any amounts received by CTF and designated for the requested fund are held by CTF exclusively as an agent of the fund beneficiary(ies), that CTF retains no discretion over the use of such funds and that amounts received by the fund do not constitute tax deductible contributions to CTF. I will include the statement that amounts received by the fund are not charitable contributions in all written and oral statements relating to the fund.

Requestor's Signature \_\_\_\_\_ Date: \_\_\_\_\_

\*If Caltrans related, requires Division Chief or Deputy District Director. In the case of other organizations, an equal level manager must authorize and sign.

**CALIFORNIA TRANSPORTATION FOUNDATION**  
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