

Dear Social Worker.

Thank you for considering to refer one of your patients for a Dream. We look forward to working on this request and to learning more about your patient.

In an effort to gather data that will help us measure the quality-of-life impact Dreams have on a patient and their end-of-life care, we are asking referrers to complete a short questionnaire. The questions are part of the World Health Organization's Well-Being Index (WHO-5), which was originally presented in 1998 as part of a project on the measurement of well-being in primary health care patients. It has shown to be a reliable measure of both positive and negative wellbeing.

Would you please consider asking your patient five simple questions before starting to explore the possibility of a Dream?

We ask that you record your patients WHO-5 answers **before** discussing a Dream with them, and then **again a few weeks after the Dream is completed**. We are very aware of your workload, and the WHO-5 can be administered in 2-3 minutes.

Thank you very much for supporting us in our effort to collect meaningful data on the impact of Dreams!

Gratefully,

Dream Foundation Team



	dreamfoundation™	
Patient Name:		

Date:
Date:

Please indicate for each of the five statements which is closest to how you have been feeling over the last two weeks. Notice that higher numbers mean better well-being.

WHO-5 WELL BEING INDEX

Example: For line 1, if you have felt cheerful and in good spirits more than half of the time during the last two weeks, check the corresponding box.

	Over the last two weeks	All of the time	Most of the time	More than half of the time	Less than half of the time	Some of the time	At no time
1	I have felt cheerful and in good spirits						
2	I have felt calm and relaxed						
3	I have felt active and vigorous						
4	I woke up feeling fresh and rested						
5	My daily life has been filled with things that interest me						

Thank you for helping us to gather data on the impact of Dreams on patients nationwide. This questionnaire is anonymous, and only the data collected will be shared. Please email the questionnaire to **WHO@dreamfoundation.org** or mail to **Dream Foundation**, **1528 Chapala St. #304, Santa Barbara, CA 93101**

Kindest.

Dream Foundation Team



Hospice Referral - Dream Request Application

Dream Applicant, friends or family members may not use this application; ONLY a hospice representative may submit this. If the Dream Applicant is NOT under hospice care, please complete the General Application available on our web site.

Dear Hospice Representative,

The Dream Foundation is a dream-granting organization for adults with a life limiting illness and a <u>life expectancy of one year or less</u>. We do our very best to grant Dreams for those unable to fulfill them on their own.

We are a small nonprofit organization based in Santa Barbara, California. We receive hundreds of requests from across the country and review each Dream request as quickly as possible. By working together, with people helping people, we will make every effort to make your patient's Dream come true.

Help us to help you make the Dream come true...

- Please read this form very carefully and follow <u>all</u> the instructions to complete all the steps necessary to make your patient's Dream come true.
- Providing as accurate and current life expectancy as possible helps expedite application processing.
- You will find many answers to your questions in our Frequently Asked Questions section.
- Please submit all required information; incomplete applications will delay processing of the application.

We are unable to grant the following types of Dreams:

Requests for adults with chronic illnesses - with the exception of individuals with a clinical prognosis of 12 months or less

- Surprise Dreams
- · Legal assistance
- Hunting
- Funeral arrangements or posthumous requests transport

- Requests from individuals living outside the USA
- Cruises
- Cash
- · Reimbursements for completed dreams
- · Automobiles, Lifts, Repairs and RV rentals
- Property and home improvements or repairs
- Medical treatment/ supplies/ equipment/
- Travel outside the United States. However, on a case-by-case basis we may allow one-way travel to countries outside of the U.S. for patients who wish to die at home and consider travel to U.S. territories
- Any Dream request deemed offensive, inappropriate or inconsistent with the values of our organization or our corporate partners.

Please include a photograph, personal letter, and a copy of current tax return.

Photograph: Must be clear and taken within the past year. It may include family, pet, etc...

Letter: Must describe the Dream and its importance to the applicant. The letter should:

- Be no longer than one page in length, one side, and refer to the illness your patient is battling
- · Clearly describe the Dream and where the most help is needed to fulfill that Dream

Tax Return: Please provide a copy of the signature page of applicant's most recent tax return (Form 1040) or other proof of annual income (e.g. SSI, Disability Statement or Bank Statement)

Hospice Referral Application

Legal Name of Patient:				
Address:	City/S	tate/Zip:		
Phone: ()	Cell: ()		County:	
Age: Date of Birth: _	Curre	ent Annual Hou	sehold Income:	
Gender:	Ethnicity (Optional):			
Military Veteran: Y or N	Branch and Dates of	f Service:		
Relative Contact Information: Phone: () Address: (Including City/State/Zip if different from	Email Addre	ess:		
Dream Request:				
Alternative Dream Request (Mu (If no alternate Dream is listed, only primal Has Applicant ever been granted a Drea Does Applicant, or one of the participan Does Applicant, or one of the participan	nary Dream request will be pu am by another organization? ts in Dream, have a major cre	ursued) edit card for travel	dream request?	Yes No Yes No
Signature of Patient		Date	•	
This Bottom	Portion To Be Complete	d by a Hospice	Representative Only	
Hospice Representative:		E-	Mail Address:	
Office Phone: ()	Cell Phone: ()	Office Fax: ()
Name of Hospice:				
Address:				
City:		State:	Zip:	
To the best of my knowledge I belie	ve the Dream request will	improve the qua	lity of life for the patie	ent/Dream recipient.
DIAGNOSIS:				
The CURRENT life expectancy, i	·	nt is:		
Signature of Hospice Representative	 e MPORTANT* No faxed ap	Title	accepted	Date

Please have your patient sign and mail back to Dream Foundation Waiver and Release of Liability

I, the unders	signed social worker,	recognize	and ac	knowledg	je that th	here are risks ii	nvolved in t	he granting of a
Dream by Dr	ream Foundation, and	I I have in	formed	my patie	nts that	they will assum	າe the full lia	ability of any,
and all, injur	ies, damages, or loss	, regardle	ss of se	verity, tha	at they n	nay sustain as	a result of s	said
participation	, as outlined in the Dr	eam Agre	eement.					
			Da	te				
Hospice Rep								
correct, that	signed Dream Recipie I have read, understa medical condition to	and, and s	signed tl	he attach	ed Drea	m Agreement i	ncluding pe	ermission to
_	perform a backgroun			_	-			
•	and proper identificati			rriavore	oqueotot	a a traver brear	ii, i diidoloi	and that a major
or our our a	and proportional	511 10 1 0 q o						
If the sign	ature of the adul			ON WILI or pare			ot on this	<u>waiver</u>
Signature of	Dream Recipient					Date		
	nline, this online facs							
original form	of signature.							
J	G							
	Participants in m	y Dream	(spouse	/caregive	er) Childr	ren under 18 ye	ears of age.	
Name	Relationship	Age	Sex	DOB	\$	Signature		

Dream Agreement:

Please initial items 2, 3, 4, 5, and 20 where indicated, below:

assist in any way.

1. Granting of dream. Dream Foundation ("DF") shall assist with the Dream requests for the person identified below ("Recipient") and Recipient's immediate family members or caregiver – such as a spouse, significant other, caregiver, mother, father, and/or dependent children who live in the home and are under the age of 18, subject to the terms and conditions set forth in this agreement. DF reserves the right in its sole and absolute discretion, to decide if a Dream will be granted and on what terms. DF shall have no obligation to fulfill any Dreams hereunder if it elects to terminate or abandon such Dreams pursuant to section 10 below.

2. Permission to disclose medical condition. The Recipient grants DF the right to disclose the nature of his/her medical condition to the extent necessary in the fulfillment of the Dream. Furthermore, the Recipient grants DF permission to obtain medic information about the recipient which DF may feel necessary for fulfillment of the Dream and authorize all physicians and medical providers to provide DF with all medical information[initial here]	
3. Waiver. The Recipient and all participants hereby waive any and all rights he or she may have or may hereafter acquire against lits officers, directors, agents, and employees arising out of any injury, damages, or losses suffered by the Recipient, and all participants, arising out of or in any way related to DF preparation, execution or fulfillment of the Dream, regardless of whether sucloss or harm is caused by the active, passive or gross negligence of DF or any other person[initial here]	
4. Release. Recipient, and all participants, together, and each of them individually, does hereby forever release and remise DF, its officers, directors, agents, and employees from any and all claims, lawsuits, damages, or losses arising out of or in any way related DF preparation, execution or fulfillment of the Dream, any injury, damages, or losses suffered by Recipient or participants, or any other of whatever nature, and of whatever extent, regardless of whether such loss or damage is caused by the active, passive or g negligence of DF or any other person[initial here]	d to of
5. Indemnity. Recipient, and all participants, together and each of them individually, hereby agree to indemnify and hold harmless its officers, directors, agents, and employees of and from any and all losses suffered by DF, its officers, directors, agents, and employees as the result of any claim, lawsuit, or action arising out of or relating in any manner to DF's preparation, execution and fulfillment of the Dream, or due to a breach by Recipient, or any participants, of the representations, warranties or covenants contained in this agreement. Said hold harmless and indemnity includes, but is not limited to, reasonable attorneys fees and costs incurred by DF, it officers, directors, agents, and employees in retaining attorneys of DF's choice to defend any and all such claims lawsuits, and actions[initial here]	,
6. Relatives/friends. No person may accompany the Recipient during any portion of the Dream fulfillment, unless specifically agree to in writing between DF and Dream Recipient.	ed
7. Dream expenses. The expenses DF has agreed to pay for are those foreseeable and directly related to the fulfillment of the Dream Recipient, relatives or friends, together understand that they may be forced to incur substantial expenses as a result of unforeseen events or circumstances beyond DF's control, especially if fulfillment of the Dream involves travel. DF shall not have an responsibility or liability for expenses incurred by Recipient, relatives or friends which have not been expressly assumed by DF pursuant to this Agreement, which have been caused by unforeseen events, or circumstances beyond DF's control. For example, a particular Dream may contemplate DF paying for certain specific expenses for a specific period of time while Recipient is traveling away from home. If Recipient's medical condition deteriorates so that immediate hospitalization is necessary, Recipient may be for to remain away from home longer than the period of time contemplated by the Dream. In that event, it will be the sole responsibility the Recipient to pay for all expenses in excess of those for which DF has agreed to pay, whether medically-related, for meals and lodgings, including hospitalization, or for other goods, or services of any nature. If death occurs during Dream. DF is unable to	ny a rced

8. Fundraising. As a participant in Dream Foundation program, if needed, a campaign may be undertaken in your community, with your prior approval, to raise funds and/or frequent flyer miles to fulfill the Dream. Money raised will be used for your Dream up to a maximum allocation as described in item 7. Funds or miles raised above the allocation for your Dream will be used for future Dreams.

- **9. Representations and warranties.** Recipient, relatives, friends and participants, jointly and severally, make the following representations and warranties to DF:
- (a) they have made a true and full disclosure of all medical conditions to DF;
- (b) all information contained in the application and any materials provided in support of the application are true and correct in all material respects;
- (c) they will notify DF if and when Recipient's medical condition should deteriorate at any time prior to fulfillment of the Dream;
- (d) they are carrying, or during the fulfillment of the Dream shall be carrying, full medical insurance, including any additional coverage which may be required as a result of the Dream to be fulfilled, or that they assume the risk and personal responsibility of failing to carry adequate medical insurance;
- (e) if fulfillment of the Dream involves travel, they are able to bear the financial burden of the potentially substantial expenses which they may be forced to personally incur as a result of unforeseen circumstances or events beyond DF's reasonable control (as set forth in paragraph 7), and that they assume the risk and personal responsibility for such expenses;
- (f) Recipient has not previously been granted a Dream by DF or another charitable dream-granting organization; and
- (g) in requesting DF to fulfill the Dream, the Dream Recipient is not relying upon nor have they received any counsel or advice from DF with respect to the advisability of or the risks attendant to the Dream.
- 10. Termination of Dream. Dream Foundation shall terminate the preparation and/or fulfillment of the Dream after the signing of the Agreement, if: (1) Dream Foundation determines, after consulting with a medical professional, that fulfillment of the Dream may endanger the health or safety of Recipient or of others involved in the Dream; (2) Dream Foundation determines, after consulting with a medical professional, that the Recipient is or will be incapable of appreciating or utilizing the goods, services, or activities related to the Dream; (3) the Recipient passes away prior to the fulfillment of the Dream; or (4) DF determines, in its sole and absolute discretion, that the Dream Recipient, his or her dream or the participants of the Dream do not compliment the values of the DF or those of its corporate partners; or (5) Recipient and any participants have breached any of the representations, warranties or covenants contained in this Agreement. In the event DF aborts preparation or fulfillment of the Dream, Recipient, and all participants agree that DF shall not be held liable or responsible for any expenses that Recipient, or any participants may have incurred in contemplation of DF's fulfilling the Dream. NOTE: Only Dream Foundation may make a request for resources on behalf of a Dream. If the Dream Recipient, any participants, friends or anyone having knowledge of this Dream uses the name of Dream Foundation to solicit support, the Dream will be immediately disqualified and terminated.
- **11. Further assurances.** Recipient, and all participants agree that he or she shall, at the request of DF, execute and deliver to DF all further documents that DF deems necessary or appropriate in order to prepare, execute and fulfill the Dream, including without limitation, evidence of permission to perform a background check on the Recipient.
- 12. Counterparts. This Agreement may be executed in counterparts, any of which shall be deemed to be an original.
- 13. Amendment. This Agreement shall not be modified or superseded, except by a writing executed by the parties.
- 14. Governing law. The laws of the state of California shall govern this Agreement without regard to its conflict of laws principles .
- 15. Binding effect. This Agreement is binding on all heirs, successors, representatives, and assigns of all parties hereto.
- **16. Severability.** If any portion of this Agreement shall be determined to be invalid or unenforceable, all other portions shall remain valid and enforceable.
- **17. Entire agreement.** This Agreement, the application and all materials provided in support of the application constitutes the entire Agreement and understanding of the parties with respect to the transaction contemplated hereby, and supersedes all prior agreements, arrangements and understandings related to the subject matter. No representation, promise, inducement or statement of intention has been made by any of the parties hereto not embodied in this Agreement and no party shall be bound by or liable for any alleged representation, promise, inducement or statements of intention not set forth or referred to herein.
- **18. Captions.** The Captions appearing in this Agreement are for convenience and ease of reference only. They in no way describe, limit or extend this Agreement or any of its provisions.

19. Proof of financial hardshi	 Dream Recipient understands D 	F reserves the right to rec	quest documentation of	f financial hardship
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20. Grant of Right of Publicity. PARTICIPANTS UNDERSTAND AND AGREE THAT FULFILLMENT OF THE DREAM MAY RESULT IN PUBLICITY, WHETHER OR NOT THE DREAM FOUNDATION ACTIVELY TAKES STEPS TO PUBLICIZE THE DREAM.

The Dream Recipient and Participants hereby irrevocably authorize DF: (a) to publicize and use Participants' likenesses, voices and features, with or without their names, for any publication, promotion, advertisement, trade, business use, or any other purpose whatsoever in perpetuity; (b) to photograph, videotape, film, and record each participant in any manner the Dream Foundation chooses; (c) to copyright, convey, transmit or otherwise distribute, now or in the future, any such material involving the participants for any purpose to anyone, including the general public, through all media presently in existence or later invented, throughout the world, including without limitation print, video, television, radio, digital, internet, and social media; (d) to publicize, now or in the future, the names of the participants including information regarding them, their physical or emotional conditions and the details of any Dream granted.

The Dream Recipient and each of the Participants agrees that it is not necessary for DF or anyone else to contact them prior to releasing any information authorized by this document. Each of the Participants hereby releases DF from all liability, damages, or claims of any kind resulting in or from, or arising from the use, distribution or disclosure of any photographs, films, videotapes, electronic recording or other information regarding Participants and the Dream.

Initial here:			
(Must be initialed by ALL Partic	cipants)		
and fully understand and agree to its	provisions. All	you have read this Agreement, have retained a Participants must sign Agreement. For any m an is both on behalf of the parent or guardian a	inor
Dream Recipient	 Date		
Dream Participant	Date	Dream Participant	Date
Dream Participant	 Date	Dream Participant	Date
Dream Participant	Date	Dream Participant	Date

Frequently Asked Questions

Dream Foundation grants final Dreams for adults with a life-threatening illness. With our headquarters located in Santa Barbara, and a network of volunteers and supporters, we serve those in the greatest need around the country. We receive no state or federal funding, relying instead on the generosity of our supporters to fulfill Dream requests.

What is a Dream?

- Dream must come from the adult battling the illness
- Dream applicant must be able to communicate the Dream and comprehend/participate in the Dream experience
- Dreams can be small (a dinner out with the family, a computer), elaborate (vacation at the Orlando theme parks, travel to the Grand Canyon), or improve the quality of life (lift chair, scooter, TV)
- For more examples, please visit our website www.dreamfoundation.org/dreams
- We do not cover funeral expenses or posthumous requests
- Please also read what Dreams we are unable to grant on the cover page of the application

Do I need to be a Hospice patient to receive a Dream?

 No. We have a Hospice Application for hospice patients, and a General Application for patients still pursuing active treatment

Does it matter where I live in order to get a Dream fulfilled?

- You have to live within the contiguous United States, Hawaii or Alaska
- · You don't have to be a US citizen, but need to currently reside in the US

Filling out the application...

- Anyone can fill out the application, but the Dream applicant (or if the applicant is unable to sign, his power of attorney) has to sign it. We need to make sure that this is the patient's dream, not someone else's for the patient.
- Anyone can write the Dream letter, as long as it reflects the applicant's Dream
- The applicant has to be able to communicate his/her Dream, so if a patient is unconscious or unresponsive, we are not able to help
- If you had a wish through Make-A-Wish Foundation as a child, we need to know when that was and what your wish was, in order to determine your eligibility at this time
- If your doctor does not want to fill out Step 4 or does not want to put down a life expectancy, send the application in anyway. As long as the diagnosis is there, we will try to work with your doctor to find out if you qualify for our program or not.

- Should you get denied based on the life expectancy that your doctor put on the application, feel free to have the doctor fill out Step 4 again at a later time. We will keep your application for a year and would only need the medical part resubmitted within that time frame.
- If you don't want to know what life expectancy the doctor puts in Step 4, Medical Information, feel free to have the doctor mail or fax that page in separately. Please call us for our fax number, should you wish to do that.
- The original application has to mailed to Dream Foundation, 1528 Chapala St., Suite 304, Santa Barbara, CA 93101
- We do accept faxed applications for emergencies only. Should the patient's life expectancy
 only be from a few days to two months, you can call our office for the fax number to send the
 application in that way. We do still need the original mailed in; so don't forget to put that in
 the mail after faxing

How long does it take until I get my Dream?

- It takes about three weeks to get the application processed before we begin with the verification process
- Verification will take anywhere from a few days to several months, depending on the response time of your medical team/doctor
- Once we start working on the Dream, please allow about three weeks to arrange for air travel, as flights get more expensive the closer to the desired date they are booked
- Emergency Dream requests get processed the day we receive them and are verified ASAP
- While we will do our best to start working on your Dream as soon as possible, we can not rush your request for reasons other than medical necessity

I do not file taxes, can I still apply? What's the income limit to qualify?

- If you don't file taxes, just let us know about it and if you can, include an SSI, disability statement or a bank statement
- There is no income limit, but we want to help those in the greatest of need that are unable to do so on their own. We look at each application individually. We look at the taxable income, take into consideration how many people live in the household, geographic location, and also check if the letter talks about financial hardship. Also, if someone wants to meet a celebrity, then lack of financial means may not be the issue, but instead assistance in making that connection.

What do I need to be able to travel?

- If your Dream request requires travel, you need a major credit card or debit card with enough funds to cover any unforeseen expenses, such as the cost associated with a hospital stay and to get you home in case of an emergency
- We do not ask for your credit card number

- If your Dream request includes a hotel stay, you will need a credit card at check-in to cover
 incidentals. If using a debit card for hotel check-in please be aware that a hold will be put on
 the card from the hotel. Often, the blocked funds will not be released until about a week after
 your stay.
- You need a valid government issued picture ID
- Your doctor needs to approve your travel. We will fax additional paperwork to your doctor to best assess your medical needs and make sure that you are cleared for travel.
- Ground transportation to and from the airport and renting a vehicle will be the responsibility of the Dream recipient

What is included in a travel Dream?

- Typically, we cover air transportation (economy class only) or the cost of gas, as well as accommodations (one hotel room/family room only)
- Park passes
- Financial assistance to help with cost of meals/rental car if budget allows
- We provide travel within the USA, Hawaii and Alaska based on your location and at our discretion
- On a case-by-case basis, we may allow one-way travel to countries outside of the U.S. for patients who wish to die at home and consider travel to U.S. territories

Who can be part of my Dream?

- The Dream will be for the Dream applicant, one other adult as a caregiver, as well as your children under 18 that live in your home
- An additional caregiver will be accommodated at the doctor's request for medical reasons only
- Caregiver does not have to be a family member
- Additional people would be responsible for their own trip planning/cost

If I want to visit family or have family sent to visit me, how long can I/they stay and how many family members can be included?

- · As long as you can stay with family or family can stay with you, there is no time limit
- If you or your family need hotel accommodations, we can only cover 3-4 nights and one hotel room only
- If we bring family to you, we will be able to cover 2-3 tickets if they are flying, or gas money for one vehicle
- If you go to visit family, we will include you, your caregiver and your children under 18 who live with you

What if I have special medical needs?

- We are unable to assist with medical needs, such as ambulance transportation, oxygen, medical equipment, nurses and aids, dialysis, etc...
- We are unable to arrange or provide hospice care away from home, dialysis treatments or arrange for your oxygen needs
- Should you have a medical emergency during your Dream, we are unable to assist in any way

What if I want dentures?

We will do our best to find a dentist that will work with us to provide dentures for you.
 However, we will only be able to help if there are no teeth left, as pulling teeth is considered a medical procedure.

What if I want to meet a celebrity?

- Celebrities are hard to reach and they are very busy people. For that reason, it can take many months to arrange for a meet and greet.
- Celebrities do not make house calls, so you have to be able to travel to the concert/event that the celebrity is at in order to meet her/him and still meet our travel requirements (see above)
- In order for a meet and greet to be a good experience for both sides, we ask that if you apply to meet a celebrity, you are able to communicate with him/her
- Before beginning a celebrity Dream request, we will have a trained volunteer meet you so that
 we may learn more about you and why meeting this celebrity is so important to you

What is an emergency Dream?

- If the life expectancy of the applicant is two months or less, we consider the Dream to be an emergency. These requests can be faxed in, but the original still needs to be mailed. Please call us for our fax number.
- Emergency Dreams get processed the day we receive them and are verified ASAP
- If an emergency Dream is for a bedside reunion or similar, our turnaround time can be within 24 to 48 hours
- Emergency Dreams can not be celebrity Dreams
- If an emergency Dream requires travel by the applicant, we will be very careful to verify it with your doctor for approval. Such requests are considered on a case-by-case basis and must meet approval of our review board. Should the Dream recipient pass away while on their Dream, Dream Foundation will be unable to help in any way.

Please keep in mind – Dream Foundation reserves the right to its sole and absolute discretion to cancel/change preparation or fulfillment of the Dream at any time after signing the Agreement if the organization feels the Dream will endanger the health or safety of the recipient. Therefore we ask that all Dreams be realistic for the recipient and for Dream Foundation to fulfill.