



## **Third Party Fundraising Information Packet**

Contact:

Marie Spain, Development Associate

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## **Heart of the Valley Animal Shelter**

### **Third Party Fundraising/Event Guidelines**

Thank you for your interest in Heart of the Valley (HOV)! We appreciate individuals, organizations and companies who are willing to give time, energy and resources to conduct fundraising events that benefit HOV, helping to raise awareness and funds for our mission.

*Third party fundraising events are defined as any fundraising activity or event organized by a non-affiliated group or individual in which HOV has no fiduciary responsibility and little or no staff involvement.*

In our animal friendly community, HOV is fortunate to receive many requests for third party fundraisers each year. To help make the event successful and enjoyable, ensure the best use of HOV resources and avoid any potential conflicts with HOV donors, corporate sponsors or previously scheduled events, we have developed an application process for those interested in hosting an event on behalf of HOV.

#### **Application and Approval**

- All fundraising events/promotions to benefit HOV must be approved in advance. Please submit a third party fundraiser application to Marie Spain at [marie@heartofthevalleyshelter.org](mailto:marie@heartofthevalleyshelter.org) at least 30 days in advance of the proposed event date. We will make every effort to respond to applications within 7 business days of receipt. Please do not move forward in planning the event until you have heard back from HOV.
- HOV reserves the right to decline any event if it conflicts with the mission, fundraising efforts or event calendar or for any other reason.

#### **Heart of the Valley Resources**

- While we are happy to provide guidance for your event, we do not have the personnel needed to handle organization, coordination or administrative tasks associated with third party fundraising events. Additionally, due to a large number of requests, HOV is typically not able to provide staff to attend all events. If you feel staff presence is essential at your event, please include the reason on your application.
- HOV is not able to provide the addresses or email addresses of our donors, staff, board members, volunteers or adopters nor are we able to send mail or emails on your behalf.
- HOV can provide “animal bank” collection canisters and informational materials promoting the organization, its goals and accomplishments. Advance notice is needed regarding the quantities needed for the event.
- Requests for adoptable animals to appear at the event will be reviewed and approved on a case-by-case basis and will depend on the venue and availability of staff to handle and transport the animals.

#### **Third Party Fundraiser Host Responsibility**

- Third party fundraiser hosts are responsible for all details regarding the event including event and budget planning, underwriting costs, recruiting volunteers to help at the event, writing all

solicitation, sponsor requests and thank you letters, creating flyers and promotional materials and working the event.

- HOV will not assume any type of liability, including financial liability, for the event. Organizers must obtain liability insurance to cover the event, if necessary. Event organizers are responsible for contacting city and county government agencies and emergency personnel, if necessary and procuring equipment for water, waste disposal and crowd or traffic control.
- Third party event organizers are responsible for ensuring compliance with all local, state and federal laws. Organizers are responsible for obtaining all necessary permits, especially for those involving raffles and/or games of chance.

### **Marketing & Promotion**

- HOV's name, logo, mission or visual representation of HOV animals or facility may not be used in any way without written approval from HOV's Development Director.
- HOV has a social media and marketing calendar that is used for promotion of HOV sponsored events, program promotion, etc. Therefore, we are not typically able to send news releases; however, approved events may be promoted on HOV social media.
- Any promotion of the event must be done in a manner that avoids statements or the appearance that HOV is endorsing a product, company individual or service.
- Development staff must review and approve all promotional materials that use our name, logo, images, etc. before they are printed or distributed. This includes but is not advertising, letters, brochures, flyers and press releases. Please allow a minimum of 3 business days for approval.

### **Event Expenses and Income**

- Your application must clearly state how the event benefits HOV and that information must be clearly stated on any promotional materials.
- HOV reserves the right to approve any co-beneficiaries.
- If you intend to approach sponsors or donors for the event, HOV must receive a list of the prospective sponsors/donors before they are approached. This will help to minimize potential conflicts with existing or prospective HOV donors/sponsors.
- Only net proceeds from the fundraiser can be accepted and processed by HOV. HOV should receive a complete accounting of all funds collected and expenses related to the event. We reserve the right to inspect all financial records.
- HOV can provide a recognition letter to the event organizer for the total event proceeds; however, HOV cannot provide a donation recognition letter to individual donors unless the gift is made directly to HOV. Organizers should not state or imply to donors that funds given to the event are tax deductible.
- Bank accounts may not be opened in the name of HOV nor is HOV responsible for any costs or expenses associated with the event.
- Event proceeds must be sent to HOV no later than 60 days after the event.

## HOV Third Party Fundraising Application

*Please complete the following application and submit for consideration of approval for third party fundraisers. The application must be submitted at least 30 days in advance of the proposed event.*

Name of Company/Organization: \_\_\_\_\_

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

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

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

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

Name of Event/Promotion: \_\_\_\_\_

Date(s) of Event/Promotion: \_\_\_\_\_

Location of Event: \_\_\_\_\_

Description of Event/Activity: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will HOV benefit from the event: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will funds be raised? ☐ Sponsorships ☐ Ticket Sales ☐ Auction ☐ Raffle ☐ Donations

☐ Other (please specify) \_\_\_\_\_

What are the anticipated gross proceeds: \_\_\_\_\_

What are the anticipated expenses: \_\_\_\_\_

Projected Minimum dollars \$\_\_\_\_\_ or \_\_\_\_\_% of income to HOV

Will other organizations receive a portion of the income? ☐ Yes ☐ No

If yes, who are the other beneficiaries and how will the proceeds be divided? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Describe how you intend to promote the event/activity. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Which, if any, of the following do you propose using for the event/activity:

☐ Heart of the Valley name (typed words) ☐ Heart of the Valley logo ☐ HOV Fact Sheet or other collateral materials

Do you anticipate any support from HOV? If yes, please specifically state your expectations. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is there any additional information you would like to provide? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I have read the attached Heart of the Valley Third Party Fundraising Guidelines and both understand and agree to abide by those guidelines. I understand that my event is not considered approved until I have been notified by HOV staff. At no time with HOV be responsible for the cost, planning or staffing of my event nor will they be liable for expenses, personal injury or damages which may occur during my event.

\_\_\_\_\_  
Signature of Responsible Party

\_\_\_\_\_  
Date

*Thank you for your interest in supporting Heart of the Valley! HOV reserves the right to accept or deny any third party fundraising event. HOV will make every effort to notify the responsible party within 7 business days of receipt of this application.*

**Please email the completed return to Marie Spain, Development Associate at [marie@heartofthevalleyshelter.org](mailto:marie@heartofthevalleyshelter.org). For questions, please contact Marie at 388-9399 x 222.**