Third- Party Fundraiser –Guidelines and Application

Donations to Harbor House of Central Florida are extremely important and your interest in partnering with us to prevent and eliminate domestic abuse is greatly appreciated. Harbor House of Central Florida is accountable to the public and Internal Revenue Service for fundraising activities using the name of Harbor House of Central Florida. To this end, the following guidelines have been developed to serve as standards for those who organize special events, benefits or promotions on behalf of Harbor House. ("Sponsor" is the event organizer.)

Harbor House of Central Florida is extremely grateful to the many outside persons who wish to organize events to support our programs. However, only those third-party events which meet specific criteria and benefit Harbor House will be considered for approval. Each event will be reviewed on a case-by-case basis.

Harbor House of Central Florida defines a "Third-Party Event" as any fundraising activity by a non-affiliated group or individual, where Harbor House has no fiduciary responsibilities and little or no staff involvement.

Event Application and Approval

- Please review these Third-Party Fundraising Guidelines. After reviewing these guidelines, please complete and submit for approval the application and return it to: Third-Party Fundraising Events, Harbor House of Central Florida, P.O. Box 680748 Orlando, FL 32868 or online@harborhousefl.com.
- Approval by Harbor House of Central Florida must be obtained before you advertise or hold your event.
- Annual events should be registered with Harbor House of Central Florida each year.
- Harbor House of Central Florida reserves the right to refuse funds raised at unapproved events and activities.

Marketing and Promotion

- Third-party events may not be represented as events sponsored by Harbor House of Central Florida.
- Promotions for the event should reflect Harbor House of Central Florida as a beneficiary (i.e. "proceeds from XYZ Golf Tournament will benefit Harbor House of Central Florida").
- All promotional materials related to an event benefiting Harbor House of Central Florida must be reviewed and approved by the Development Office prior to distribution (e.g. flyers, press releases, tickets, brochures, posters, etc.).
- The use of Harbor House of Central Florida's name, logo, trademark or collateral materials is reserved for events conducted by Harbor House of Central Florida itself. Therefore, any requests for the use of Harbor House of Central Florida's logo or trademark must be used in accordance with written brand guidelines and must undergo approval. No use of Harbor House of Central Florida's name, collateral materials and/or logo will be allowed without specific request and agreement.
- All references to Harbor House of Central Florida in publicity and promotional materials for the event or promotion should refer to "Harbor House of Central Florida."
- If you would like to receive a copy of this policy to modify or use for your non-profit agency, please send your request to online@harborhousefl.com.

Event Expenses

If you must buy goods or services for the event and expenses will be incurred, please consider the following:

- Expenses incurred for conducting the event are the responsibility of the hosting volunteers and the Sponsor of the event. Harbor House of Central Florida will not be liable for any costs or expenses.
- Harbor House of Central Florida will not reimburse the Sponsor for the purchase of goods for a third-party event. No goods may be charged to Harbor House of Central Florida for any reason.
- Suggestions to reduce event expenses:
    - Secure donated goods and services.
    - Negotiate reduced costs.

Event Income

- The event Sponsor is responsible for opening and maintaining his/her own bank account for the event. Bank accounts may not be opened in the name of Harbor House of Central Florida.
- Any check payable to Harbor House of Central Florida must be sent directly to Harbor House's Development Office at P.O. Box 680748 Orlando, FL 32868.
- Only checks payable to Harbor House of Central Florida will be provided with a tax deductible acknowledgement letter in accordance with IRS and state tax regulations.
- Donations made out to an organizer or other source may be sent a general acknowledgment letter with no value attached.
- If you are deducting expenses before sending net proceeds to Harbor House of Central Florida, you should not state or imply to your donors that any funds given to you are tax deductible, and you should not use the word "donation" because it implies that they are tax deductible.
- Sponsor agrees to inform Harbor House of Central Florida of any effort to recruit major financial underwriters to ensure there is no duplication of underwriting efforts already underway by Harbor House of Central Florida.
- Kindly submit appropriate documentation from individuals and/or businesses regarding their financial donations.
- Kindly submit raised funds, payable to Harbor House of Central Florida, within 60 days of event.

Event Insurance and Liability

- Sponsor is responsible for obtaining any necessary permits and clearances required by local and state government and complying with all applicable laws. Sponsor must also obtain appropriate insurance coverage as necessary.
- All third-party events should ideally be accessible to people with disabilities. Ideally the event should take place at a venue that meets ADA regulations. Sponsor is expected to promote and make arrangements for any special accommodations and needs by participants.
- Harbor House of Central Florida cannot be held liable for details associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance or liability coverage.

Tax Guidelines and Implications

- As a responsible steward of public funds, Harbor House of Central Florida holds to the standard set forth in the Better Business Bureau guidelines. Events held to benefit Harbor House of Central Florida are expected to keep expenses to a minimum.
- If Sponsor represents to the public that proceeds will benefit other organizations in addition to Harbor House of Central Florida, Sponsor should be prepared to provide access to an accounting of revenues and expenses. If so requested, an accounting and fund distribution will be expected within 60 days after the conclusion of the special event or promotion.
- Sponsor is responsible for complying with all IRS regulations registrations applicable to the event.
- Federal tax laws disallow third-party events from using Harbor House of Central Florida Tax Exemption number or Federal Employer Identification number when purchasing any goods or services from suppliers or vendors.

How can we help you with your event?

- Harbor House of Central Florida is extremely appreciative of the volunteers who manage third-party events to benefit its programs. Harbor House of Central Florida is limited in the amount of assistance it can provide a third-party event. Volunteer third-party management of the event or project minimizes the cost per dollar raised for our programs and allows the Harbor House of Central Florida staff to continue the work they are already doing to support our mission.

Harbor House of Central Florida can provide the following:

- Advice and suggestions on event planning, as time allows.
- Approval of the use of Harbor House of Central Florida's name, logo and collateral materials.
- A letter of authorization to be used to validate the authenticity and intention of the event and its organizers.
- Promotion of your event, when appropriate, to Harbor House of Central Florida's community supporters and followers through social media platforms such as Facebook and Twitter one week prior to the date of the event.
- Post event recognition, when appropriate, to Harbor House of Central Florida's community supporters and followers through social media platforms such as Facebook and Twitter during the week following the date of the event or when the contribution is submitted to Harbor House of Central Florida.
- Acknowledgment and distribution of tax receipts for contributions made payable and submitted to Harbor House of Central Florida.

Harbor House of Central Florida is unable to provide the following:

- Assistance in soliciting donations, handling mailings, attending committee meetings, recruiting attendees or collecting monies.
- Harbor House of Central Florida's tax-exemption number for making any purchases related to your event.
- Guaranteed volunteer, Board Member, or staff attendance at the event
- Access to donor lists or contacts
- Responsibility of any nature or kind associated directly or indirectly with the event, including, but not limited to, expenses, purchases, insurance or liability coverage

Please complete the following application and submit for consideration of approval for third-party fundraisers. **The application must be submitted a minimum of three weeks prior to the date of the event.**

Third-Party Application
(Please print or type)

1. Name of Company/Organization: _____

2. Contact Name: _____

Title: _____ **Phone:** _____ **Fax:** _____

E-Mail: _____ **Website:** _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

3. Date(s) of event/promotion: _____

4. Location of event & address: _____

5. Description of event/activity (i.e., basic concept/promotion/goal): _____

_____

6. In what way would you like to submit your contribution to Harbor House? (at this time Harbor House of Central Florida is able to collect contributions by check) _____

_____

7. Projected Minimum/Maximum Dollars $_____ / $_____ or _____% of income to Harbor House of Central Florida

8. Will other organizations receive a portion of the income? Yes _____ No _____
(If yes, please indicate who they are and the dollar amount $_____ or _____% of income they will receive.)

9. Proposed use of Harbor House of Central Florida name, logo and collateral materials
Which, if any, names, logo and or collateral materials are you requesting permission to use or display in connection with your event? (Please check)

_____ Harbor House of Central Florida (typed words)

_____ Harbor House of Central Florida (graphic logo)

_____ About Harbor House one pager (pdf)

_____ Get involved one pager (pdf)

_____ Harbor House Paws for Peace Kennel (pdf)

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How do your propose to use each of the above? _____

_____

(Note: Pre-approval is required before distribution.)

10. Do you anticipate *any* other support or participation from HHCF? Yes _____ No _____
(If yes, please specifically state your expectations.)

_____

11. Is there any other additional information about the event you would like to share? _____

_____

_____

_____

I have read the enclosed Harbor House of Central Florida's Third-Party Fundraising Guidelines and both understand and agree to all of the terms of agreement.

_____ _____

Signature of Responsible Party **Date**

Thank you for your interest in partnering with Harbor House of Central Florida to end and eliminate domestic abuse in Central Florida.

Contact: Katie Fischer, Online Giving Coordinator
Harbor House of Central Florida, Inc.
P.O. Box 680748
Orlando, FL 32868
407-886-2244 ext. 239
Fax- 407-886-0006
online@harborhousefl.com

Once the application is submitted, you will be contacted to discuss the details of the agreement as well as each organization's responsibilities.