



Heartland Family Service Third-Party Fundraising Events Form and Standards

Event Title	_____
Date	_____
Site/Location	_____
Third Party Organizer Name	_____
Phone	_____
Address	_____
City, State, Zip	_____
Email Address	_____
Estimated Fundraising Goal	_____

Thank you for your interest in Heartland Family Service (HFS). Each year, we receive many requests to hold a promotion, event, or sale (Third Party Fundraising Event) to benefit our organization. We are grateful for dollars raised through Third Party Fundraising Events - they help Heartland Family Service fulfill its mission of strengthening individuals and families in our community through education, counseling, and support services. *(A Third-Party Fundraising Event is defined as any activity by a non-affiliated group or individual where Heartland Family Service has no fiduciary responsibility and little or no staff involvement.)*

Before an individual, company, or organization may proceed with a fundraiser to benefit Heartland Family Service, a proposal (see item number 1, below) will be submitted and returned to Heartland Family Service a minimum of 60 days before the scheduled event.

If you have an idea or plan for an event that will benefit Heartland Family Service, please follow these guidelines. Please hold off moving forward with your plans until you have submitted your proposal and been notified of our decision.

1. Mission-related benefit

All Third-Party Fundraising Events will align with and benefit the mission of Heartland Family Service. This is decided on a case-by-case basis by Heartland Family Service event staff for final approval. Proposals for all Third Party Fundraising Events are submitted to Events@heartlandfamilyservice.org at least 60 days in advance of the event.

2. Use of Heartland Family Service name and logo

Third Party Fundraising Event organizers agree to not use the Heartland Family Service logo unless approved in advance, in writing. The use of Heartland Family Service letterhead is unavailable. The party may cite Heartland Family Service by name as the beneficiary of the event in printed materials – press releases, print, broadcast, or other promotional venues – but agrees to seek review and approval by Heartland Family Service Marketing and Communications Department (MarComm@heartlandfamilyservice.org) prior to printing or publicizing.

Heartland Family Service will approve all promotional materials, including, but not limited to advertising, letters, brochures, flyers, and press releases prior to production or distribution. All promotional materials will clearly state the percentage of proceeds that will benefit Heartland Family Service.

3. Financial Policies

- a. Heartland Family Service's tax identification number and state sales tax exemption certificates cannot be made available to Third Party Fundraising Event organizers.
- b. Heartland Family Service will receive a list of targeted sponsors for the event before they are approached to minimize overlap with other Heartland Family Service events and/or fundraising campaigns that may be underway.
- c. Checks for any Third-Party Fundraising Events are made payable directly to the third-party organizer of the event, rather than HFS.
- d. At the conclusion of the event, the organizer agrees to write a single check to Heartland Family Service in the amount of the net proceeds. Third Party Fundraising Event revenue and expenses do not flow through Heartland Family Service accounting system. Only the final net proceeds from the event are to be processed by Heartland Family Service. Heartland Family Service will receive a complete accounting of all funds collected and expenses related to the event. We reserve the right to inspect all event financial records.
- e. To ensure proper stewardship of funds, the organizer agrees to submit all proceeds from the event within 60 days of the event.
- f. Heartland Family Service is responsible for depositing checks made out to Heartland Family Service.
- g. Heartland Family Service provides tax acknowledgements only for donations directly received by Heartland Family Service; therefore, funds from individuals or companies received by the Third Party will likely not receive an acknowledgement. Organizers or donors should refer to their personal tax advisor with questions.
- h. Heartland Family Service does not pay invoices, provide petty cash, or supply merchant processing for any third-party event.
- i. Heartland Family Service does not allow Third Party Fundraising Event organizers to use our online registration or database systems.
- j. Bank accounts may not be opened by anyone in the name of Heartland Family Service.

4. Alcohol guidelines

Heartland Family Service will not purchase alcohol for a Third-Party Fundraising Event. The event should adhere to all federal, state and local laws, and regulations in the serving or selling of alcohol at events.

5. Raffle/Gaming guidelines

The event will adhere to all local and state raffle or gaming laws and regulations. Raffle permits may not be taken out in Heartland Family Service's name. Third Party Fundraising Event organizers are responsible for obtaining all permits, including those for raffles and/or games of chance.

6. Marketing

In accordance with Heartland Family Service's Marketing Policy, HFS will not have partnerships with any corporation that has a significant involvement in the manufacturing of tobacco-related products, pornography, or weapons. However, a company that produces an excluded product or service may sponsor HFS through a separately identified, non-excluded product or service it offers. HFS will also not have partnerships with any corporation with questionable environmental practices or child labor issues. The foregoing exclusions are not intended to be exhaustive or complete. HFS reserves the right to refuse sponsorships with any company.

Heartland Family Service cannot guarantee media coverage (television, radio, or print). You may contact the media about your event or promotion, provided you communicate with Heartland Family Service about or regarding contacts or arrangements that are made. Heartland Family Service does not purchase advertising to promote Third Party Fundraising Events. Heartland Family Service may be able to promote the approved event on our social media platforms, within reason and depending on our existing social media calendar.

7. Liability insurance

Heartland Family Service cannot issue insurance coverage or certificates. The Third-Party Fundraising Event organizer is encouraged to seek liability, and any other appropriate insurance coverage, through a licensed provider. Heartland Family Service is not financially liable for the promotion and/or staging of Third-Party Fundraising Events. The Third-Party Fundraising Event organizer assumes any and all risks which might be associated with the event and further waives, release, discharge, and covenant not to sue Heartland Family Service, its officers, members, sponsors, organizers, or other representatives or successors and assigns, for any injuries or damages of any kind whatsoever as a result of the event and related activities to participants, staff, or volunteers.

8. Privacy

Due to privacy laws, Heartland Family Service does not loan or give out its mailing or Email lists for any Third-Party Fundraising Event, but may consider running a mailing on behalf of the Third Party Fundraising Event organizer. Responsibility for costs associated with such a mailing will be determined on a case-by-case basis.

9. Fundraising

Heartland Family Service will not lend its name for the purposes of soliciting sponsorships, raffle or auction items for Third Party Fundraising Events. All fundraising and solicitation efforts must originate from and be managed by the third party.

10. Independence

While Heartland Family Service accepts financial support through the Third-Party Fundraising Events, it will always exercise independent judgment in its decision making.

These are the Heartland Family Service's standards for Third Party Fundraising Events. There may be circumstances that warrant having a more formal agreement with an organizer for a Third-Party Fundraising Event.