



Third-Party Fundraising Policy

Policy Goals:

Villa Leonardo Gambin (VLG) relies on community donations, volunteer involvement, sponsorships, partnerships and third-party events in order to achieve the sustainability of the organization. These involvements should promote greater awareness of VLG in the community.

In order that both VLG and the Third-Party Event Coordinator have a clear understanding of expectations in the execution of a fundraising event, and so VLG will be able to assess whether it is able to participate in the particular initiative, *Third-Party Fundraising Guidelines* have been developed.

Community members interested in donating proceeds from their events must read the Third-Party Fundraising Guidelines, initial where indicated and sign as having accepted them.

WHAT IS A THIRD-PARTY ACTIVITY?

A Third-Party activity can be defined as any fundraising initiative brought forward by an individual(s), community group, service club, or business external to the VLG who wish to raise money through a planned activity that is designed, managed and financially resourced by the external participants.

THIRD-PARTY LEVEL ONE ACTIVITY – Straight Donations:

Level One Activities are essentially independent from VLG, however, all net proceeds or some portion of the activities funds are donated to VLG. We welcome such donations. Should it be requested, VLG is willing to provide the following support:

- Appropriate VLG signage
- VLG staff members or volunteers to attend the event or cheque presentation

THIRD-PARTY LEVEL TWO ACTIVITY – Indirect Participation:

Level Two Activities are larger in scope requiring that the Third-Party Event Coordinator use significant resources in order for the initiative to be a success. This usually requires the Event Coordinator to undertake public promotional activities, such as distribution of posters and sending letters to sell tickets. In these cases, the organizers must meet the VLG evaluation criteria.

THIRD-PARTY LEVEL THREE ACTIVITY – Partnership:

Level Three Activities are initiatives requiring active involvement of VLG staff and volunteers in the planning and execution of the event. In the case of such initiatives, the Third-Party Event Coordinator must complete a written, formal proposal for consideration by the VLG. When an application has been approved, a formal agreement shall be entered into so that the obligations and responsibilities of each party are clearly understood.

THIRD-PARTY ACTIVITY GUIDELINES

1. All three levels of activity require that Third-Party activities be submitted through a written application to the VLG. Appendices A and A1 are attached for your convenience and completion.
2. The Event Coordinator agrees to comply with the guidelines herein, completing all required appendices and including correct documentation.
3. The Third-Party Application shall be completed and submitted to the VLG during the event planning phase and no later than eight weeks prior to the event, during the event-planning phase. The VLG shall provide notice of either the acceptance or rejection of the Third-Party Application no later than two weeks after the application submission where said Application has been approved by the VLG, a formal agreement shall be executed by the Event Coordinator and the VLG Executive Director.

The VLG reserves the right to add conditions to its approval of an Application, where applicable, and the Applicant shall have one week in which to accept such conditions.

Third-Party Fundraising Guidelines

If you wish to help VLG's mission by holding a fundraiser with net proceeds or a portion thereof being donated to VLG, you agree to abide by and to follow these guidelines. Please read the following guidelines and place your initials where indicated. We want to know about your event and assist where we can.

1. VLG encourages fundraising events that are consistent with its good image and reflect its mission statement, "Create and Celebrate a Purposeful, Exceptional, Quality of Life".

_____ Initials

2. VLG Board of Directors, staff and volunteers will act in the best interest of the VLG, rather than in furtherance of personal interests or in the interests of Third Parties. The Third-Party Event Coordinator, their staff and volunteers, shall not be entitled to any donor information of the VLG.

_____ Initials

3. To conduct an event, you are required to complete an application included as Appendices A and A1. Once you submit your application, we will review it and respond within a maximum of two weeks of receipt. If the application is approved, we will provide you with a Letter of Agreement. This may be shown to potential donors, sponsors and volunteers.

_____ Initials

4. Any organization/group that is donating a portion of their net proceeds rather than the full amount must state either the exact percentage or specific dollar amount of the net proceeds, along with anticipated total dollar amount expected to be raised from the event.

_____ Initials

5. Any organization/group wishing to use the VLG name or logo on any materials, including advertising, must receive VLG's written approval prior to production.

_____ Initials

6. VLG must not be party to any liability coverage without prior knowledge and approval. Approval will generally apply only to Level Three Activities as discussed in the Introduction section.

_____ Initials

7. If required, the acquisition of insurance for an event is the sole responsibility of the Event Coordinator.

_____ Initials

8. The sponsoring organization/group agrees to underwrite all costs of the special event of promotion and to secure such underwriting. VLG shall incur no costs, unless otherwise agreed to in writing prior to the special event or promotion. Examples would include providing participants with a gift from the VLG or paying for printing of event materials.

_____ Initials

9. All expenses incurred from Third-Party activities are the responsibility of the event organizers and may be reimbursed from the event proceeds. VLG shall not be responsible for any financial loss incurred from any event.

_____ Initials

10. The sponsoring organization/group is responsible for obtaining all required and governmental licenses for the event (raffles, liquor sales etc.)

_____ Initials

11. VLG shall not provide staffing resources for this event such as soliciting donations, handling mailings, attending committee meetings, recruiting attendees or collecting monies, unless approved by the VLG in writing. All VLG resourcing requirements must be identified on the application.

_____ Initials

12. VLG agrees to provide the sponsoring organization/group with appropriate recognition commensurate with the size of their gift, at the VLG's sole discretion.

_____ Initials

13. Obtaining goods or services for the event from businesses must have prior written approval from the VLG before soliciting to ensure duplicate solicitation is avoided.

_____ Initials

14. The sponsoring organization/group agrees to handle all monetary transactions for the special event or promotion and to present the donation to VLG within 30 days of the completion of the event, or as agreed to in writing with the VLG.

_____ Initials

15. The preferred method of payment is a cheque or money order payable to Villa Leonardo Gambin. Attached to the payment, should be a list on donors and donations of materials and supplies. Appendix B and C provides formats for Cash and Gift-In-Kind Donations.

16. Tax receipts may be provided for any cash donation of \$25 or more. We provide tax receipts in accordance with Canada Revenue Agency Guidelines.

_____ Initials

17. The sponsoring organization/group agrees to ensure that all materials borrowed are returned promptly and in the same condition, they were received. The sponsoring organization/group agrees to accept responsibility for damage or loss of materials borrowed from VLG.

_____ Initials

ACCEPTANCE OF THE ABOVE GUIDELINES BY THE ORGANIZATION/GROUP:

Name of Organization: _____

SIGNATURE: _____ DATE: _____

Position: _____

VLG Approval SIGNATURE: _____ DATE: _____

**THIRD PARTY FUNDRAISING
APPENDIX A
Event Application Form**

Are you organizing this event as: () An individual or () Business

Contact Person:

Name of Organization/Group: _____

Title: _____

Address: _____

Phone #: _____ Fax# _____

Email: _____

Tell us about your event:

Event name and date: _____

Event venue and location: _____

Expected number of event attendees: _____

Briefly describe the event:

***Note: please consider a contingency plan in the event of weather or other issues that may arise.**

What is your net revenue goal? \$ _____

What percentage of proceeds or dollar amount will be donated to VLG? _____% or \$ _____

How are you planning to raise revenue (Please circle as many of the following that best pertains to your event):

Ticket Sales Donations/Pledges Silent Auction Live Auction

How are you planning to promote your event? Please circle the types of materials you plan on developing: Posters Flyers Brochures Website

Other (please specify) _____

We require a letter of support: Yes No

Do you plan to contact any individuals or companies for sponsorships? Yes No

If yes, please list them below (attach a separate list if necessary):

By submitting this event application with my name and/or signature, I have read, understand and agree to abide by the attached Third-Party guidelines and conditions.

***Note: This application must be submitted to the Executive Director of the VLG for review and approval. The Executive Director will contact you to confirm approval and review details of the proposed event.**

If you are under the age of 18, please have a parent or guardian complete and sign this form.

Organizer(s) Signature: _____

Date Submitted: _____

**Thank you for supporting VLG
We look forward to working with you!**

Acceptance of above organization/group by the VLG:

Signature: _____ **Date:** _____

THIRD PARTY FUNDRAISING

**Appendix A1
Proposed Budget**

Sources of Revenue:

_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____

(A) TOTAL Revenue: \$ _____

Expected donated materials – goods and services:

_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____

(B) TOTAL Donations Material(s) \$ _____

(C) Total gross revenue (A+B) \$ _____

Expenses Itemized:

_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____

(D) TOTAL Expenses \$ _____

(E) TOTAL NET REVENUE (C-D) \$ _____

Total donation to VLG:

\$ _____ OR percentage of Proceeds: _____%

**THIRD PARTY FUNDRAISING
APPENDIX B
Donation Tracking Form**

Organization/Group: _____

Event: _____

Date: _____

***Please make cheques payable to:
Villa Leonardo Gambin***

Please provide the following information so that receipts can be issued correctly.

Date of Donation	Individual or Company Name Address/Ph/Email	Receipt Requested Y or N (issued for \$25+)	\$ Amount of Donation	Type of Donation Cash/Chq		For Internal Use Only Tax Receipt #

THIRD PARTY FUNDRAISING

APPENDIX C

Donations of materials & supplies – tracking form (Gift-in-Kind)

Organization/Group: _____

Event: _____

Event Date: _____

Contact Name: _____

Contact Phone: _____

Contact Email: _____

DONOR INFORMATION

Name:	
Address:	
City/Province:	Postal Code:
Phone:	Fax# Email:
Donated Item: (attach documentation if available)	Purpose of Donation: (Auction/door prize etc.)
Date of Donation:	Value of Donation: (Retail)
Tax Receipt Requested: <input type="checkbox"/> Yes <input type="checkbox"/> No (These will be issued at the discretion of VLG and in accordance with Revenue Canada Tax Guidelines. If a tax receipt is requested, documentation (i.e. invoice/bill must be attached.)	
Office Use Only:	

To be submitted by the Event Coordinator with payment of donation.