

CHILLIWACK COMMUNITY SERVICES

THIRD PARTY FUNDRAISING EVENTS

POLICY AND GUIDELINES

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CHILLIWACK COMMUNITY SERVICES THIRD PARTY FUNDRAISING EVENTS POLICY GUIDELINES

Contents

- 1. INTRODUCTION..... 3
- 2. DEFINITIONS 4
- Section A – Individual and Group Fundraising Efforts5**
- 3. CRITERIA 5
- 4. EVALUATION OF THIRD PARTY EVENTS 6
- 5. GUIDELINES 6
- 6. DONATIONS AND SPONSORSHIPS..... 7
- 7. GAMING (Including Raffles, 50/50 Sales and Licenses)..... 7
- 8. STAFFING AND VOLUNTEERS..... 7
- 9. FINANCING AND INSURANCE..... 7
- 10.ACCOUNTABILITY 8
- 11.TAX RECEIPTS AND GIFT ACKNOWLEDGEMENTS..... 8
- 12.GIFTS-IN-KIND 8

CHILLIWACK COMMUNITY SERVICES

1. INTRODUCTION – POLICIES, CRITERIA AND GUIDELINES FOR THIRD PARTY FUNDRAISING EVENTS

Chilliwack Community Services (CCS) is an independent local charity providing opportunities with people to make positive change in their lives. Our vision is "To be a leading partner in helping our community be the best it can be". Our values are:

People

- We believe in the inherent worth of every person.
- We believe in building on each person's strengths to help them reach their potential.
- We value and encourage diversity in our community, our people and our programs.
- We believe in recruiting and retaining the best possible staff, Board and volunteers, working in partnership to achieve our mission.
- We will provide a workplace environment where open communication, trust and mutual respect prevail. Effective teamwork, personal initiative and calculated risk taking are essential to our success.

Community

- We believe in providing leadership and being a valued partner in identifying and responding to community needs.
- We believe achieving exemplary volunteerism, community spirit and an outstanding quality of life is the shared responsibility of all individuals, organizations and institutions.
- We are committed to social equity and advocating for those in need.

Accountability

- We will serve the needs and respect the values of the community in which we operate.
- We are committed to being a progressive, community directed, publicly accountable and financially responsible agency.
- We will adhere to the highest ethical standards.

Financial and other forms of support from Third Party Fundraising Events may help CCS to develop more effectively the programs necessary to:

- Strengthen the capacity of children, youth, families, seniors and immigrants in our community.

- Influence the design and implementation of policies and services related to various community services.
- Provide services and supports helping children, youth, families, seniors and immigrants.
- Build the financial and human resources and partnerships required to address community needs.

In accordance with Canada Revenue Agency (CRA) guidelines and for the benefit of CCS and personnel dedicated to fundraising at CCS. CCS has established the following policy and guidelines to assist individuals and groups in raising funds for the benefit of CCS.

The following policies provide CCS with guidance in the review and assistance to supporters through Third Party Fundraising Events.

2. DEFINITIONS

Third Party Events

There are two types of third party fundraising:

Individual: The first type is a fundraising event where net proceeds benefit CCS, which is organized and executed by an individual or group of supporters who are not affiliated with CCS.

Group: The second type of fundraising events is an effort by a group, such a school, business or community organization to raise funds for CCS.

Third-party events are not run by CCS staff; however, supports such as volunteers may be provided, subject to an advance agreement of the role of the Third Party Organizer(s) and CCS.

Section A – Individual and Group Fundraising Efforts

3. **CRITERIA**

Third party events are required to:

- Be consistent with the mission and values of CCS.
- Maintain a positive presentation and give CCS positive exposure and increased public awareness.
- Provide an overall financial net gain to CCS operations or programs.
- Provide positive marketing/public relations exposure
- Meet staff and volunteer resource requirements.

CCS reserves the right to:

- Refuse involvement, and the use of its name and logo, in any event that does not meet with its expressed approval.
- Relinquish support of any third party event that does not abide by the policies, criteria, and guidelines set out in this agreement, without any liability or obligation.

CCS does not permit the following types of fundraising in a third party context:

- Programs raising money on commission;
- Events encouraging/involving behaviour counter to CCS' mission and/or programmatic activities;
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity;
- Direct solicitation (including, but not limited to, door-to-door canvassing, telemarketing or broad-based internet broadcasting)

4. **EVALUATION OF THIRD PARTY EVENTS**

The Executive Director at CCS, upon recommendation by the Fundraising Committee and Fundraising Coordinator, and review of the application form, will approve third party fundraising events. The Fundraising Coordinator will confirm in writing the decision of the Executive Director.

An application form must be completed for review a minimum of 10 days in advance of the event. For more complex events requiring volunteers, CCS requests

greater advance notice and will consider involvement where there is ample planning time to ensure a strong event.

5. GUIDELINES

For approved third party events/promotions, the Third Party Event Organizer(s) and CCS are required to adhere to the following guidelines:

CCS Brand

- It is important for CCS to uphold brand integrity and consistency in dealing with the public. The use of CCS logo is permitted for third party fundraisers.
- The use of the CCS name is permitted only with CCS approval.

Promotional Materials

- CCS will have final, signed approval on ALL promotional materials. (brochures, flyers, advertisements, public and media communications)
- CCS must review and approve all promotional materials (including, but not limited to, letters, brochures, press releases, flyers, and advertising) prior to distribution.
- CCS name is not permitted on any product packaging.
- All promotional materials must clearly state the percentage of proceeds or portion of ticket price that will be donated to CMHA.

6. DONATIONS AND SPONSORSHIPS

Applications will provide a list of sponsors who will be asked for support, including a description of their donation and/or sponsorship, its retail value, and contact information. This information will allow CCS to better recognize partners within the community.

- CCS will have the final approval of the solicitation of all sponsors.
- CCS will not solicit sponsors on behalf of Third Party Event Organizer(s), nor will they provide contacts for sponsorships.

7. GAMING (Including Raffles, 50/50 Sales and Licenses)

Third party events involving licenses and fees will conform to government regulations; (federal, provincial and municipal) including requirements by the licensing body on the distribution and use of funds. It is the sole responsibility of the Third Party Event Organizer(s) to fill out and submit all such applications. A minimum of five business days must be given to CCS to review such licenses. Third

Party Event Organizer(s) will pay the fees for said licenses and are responsible for filing post event forms/reports.

8. STAFFING AND VOLUNTEERS

The Third Party Event Organizer(s) will provide staffing and recruitment of volunteers for said event. The staffing and volunteers are a majority responsibility of the Third Party Event. If there is a requirement for CCS volunteers, the requirement must be outlined in the application and approved by CCS. Upon request, CCS will provide a letter to volunteers recognizing them for their volunteer hours.

9. FINANCING AND INSURANCE

- The Third Party Organizer will provide budget information on the revenue, its nature, an estimate of the net proceeds on the application form. CCS will not pay for any items on behalf of the Third Party Organizer(s) (including no vending for ticket sales).
- Once the event has been concluded, and within 10 business days, the Third Party Organizer(s) will provide a financial report utilizing the financial format of CCS.
- Only the final net proceeds will be processed by CCS. Under no circumstances will third party revenues and expenses flow through the CCS.
- Net proceeds of the third party event must be submitted within 30 days of the event.
- CCS will not underwrite any third party event, and CCS insurance will not cover third party events.
- CCS is not responsible for the losses of an event, injury or any other circumstance arising from the event.

10. ACCOUNTABILITY

Third Party Event Organizer(s) will:

- Keep a record of revenues and expenses for submission to CCS if requested.
- Provide periodic status reports to CCS on an agreed-upon basis.
- Provide reasonable notice of any third party event cancellation.
- Will inform CCS if the third party event is to benefit other charity partners.
- Will be responsible for any financial losses or unsettled accounts.

- Submit budgets, financial reports and the net proceeds within the required time period.

Third Party Event Organizer(s) will not:

- Name CCS in, or sign contracts on behalf of Third Party Event Organizer(s) without CCS's written consent.

11. TAX RECEIPTS AND GIFT ACKNOWLEDGEMENTS

- CCS may provide receipts for income tax purposes, for qualified gifts.
- CCS reserves the right to issue or not issue any receipts at its sole discretion, in accordance to Canadian Revenue Agency rules and regulations.
- CCS adheres to all relevant privacy laws.

12. GIFTS-IN-KIND

CCS does not issue tax receipts for Gifts-In-Kind to third party events. Gifts-in-Kind are gifts of property, rather than cash and marketable securities. These include (but are not limited to) gifts of supplies, equipment, books and artwork. Gifts-In-Kind not eligible for tax receipts include a gift of professional/personal services from an individual, a gift by a company for its principal product or service, and donations of used clothes or furniture etc. Promotional materials (limited to electronic fact sheets or brochures, if available).