



Third Party Fundraising Agreement

2022

Start Something BIG by committing to raise funds to support the work we do to recruit and train the volunteers we need, and provide ongoing assistance and resources to the many young people we serve



**Big Brothers
Big Sisters**

OF NORTH AND WEST NIAGARA

Fundraising Guidelines

1. Big Brothers Big Sisters of North and West Niagara encourages fundraising events that are compatible with our mission, vision and values. Prior approval to hold a third party event is required. Approval is based on the type, theme and financial viability of the event. Big Brothers Big Sisters of North and West Niagara reserves the right to withhold the use of its name and logo from any event, initiative, promotion, performance or presentation it feels is inappropriate.
2. To conduct your own fundraising event, please complete the *Third Party Event Application Form* and submit to us at least 14 days prior to your event.
3. All advertising, media releases or use of the Big Brothers Big Sisters of North and West Niagara name or logo in any form either before or after the event must be approved in advance by the agency's Marketing & Communications Officer.
4. All promotional materials must state that your event is "in support" of Big Brothers Big Sisters of North and West Niagara and is not an official Big Brothers Big Sisters of North and West Niagara event.
5. The third party organizer will not claim to represent Big Brothers Big Sisters of North and West Niagara in the solicitation of donations or product.
6. Taking commission, for any purpose, on funds raised as part of a third party event is prohibited.
7. The third party organizer is responsible for meeting all municipal/provincial or federal standards and fulfills all legal authorization(s), permit(s), license(s), precaution(s) and/or general liability insurance required to organize an event. Big Brothers Big Sisters of North and West Niagara must not be party to any liability coverage without prior knowledge and/or approval. Big Brothers Big Sisters of North and West Niagara accepts no legal responsibility and cannot be held liable for any risk, injury or otherwise.
8. The third party organizer will be responsible for all costs associated with the event and will handle all monies until the official donation is submitted to Big Brothers Big Sisters of North and West Niagara. Event expenses are to be approved by Big Brothers Big Sisters of North and West Niagara and deducted before sending the proceeds to Big Brothers Big Sisters of North and West Niagara. Big Brothers Big Sisters of North and West Niagara will incur no costs unless otherwise agreed in writing in the "Additional Details" section of the agreement prior to the event or promotion.
9. The sponsoring organization/group agrees to handle all monetary transactions for the special event or promotion and to present the proceeds to Big Brothers Big Sisters of North and West Niagara within 30 days of the event.
10. When tax receipts are requested, the third party organizer is responsible for collecting the names, addresses and contact information of all donors, and is required to provide this information to Big Brothers Big Sisters of North and West Niagara within 7 days of the event. Tax receipts can be issued to in-kind donors of the event if their donation comes with a receipt that states fair market value of their donation.
11. Big Brothers Big Sisters of North and West Niagara issues official tax receipts in accordance with Canada Revenue Agency guidelines.

12. Involvement of Big Brothers Big Sisters of North and West Niagara staff and volunteers will be at our discretion and will be based on availability, location and nature of the event.
13. The third party event organizer agrees to ensure that all materials borrowed are returned promptly and in the same condition they were received. The organizer agrees to accept responsibility for damage or loss of materials borrowed from Big Brothers Big Sisters of North and West Niagara.
14. Big Brothers Big Sisters of North and West Niagara will not be responsible for mailing materials to attendees/participants or volunteers, other than the mailing of applicable tax receipts.
15. The third party event organizer must send a complete accounting of all income and expenses associated with the event to Big Brothers Big Sisters of North and West Niagara. By publically naming Big Brothers Big Sisters of North and West Niagara as the beneficiary of your event, you are required to donate the net proceeds to us within 30 days of event completion. Any cheques should be made payable to Big Brothers Big Sisters of North and West Niagara.

Requesting promotional and graphic design support

Big Brothers Big Sisters of North and West Niagara is happy to offer our resources in order to make your event a success. If you request graphic material or event promotion, a minimum of 7 days is required to complete your request. The Marketing & Communications Officer will contact you via the information provided on the *Third Party Application Form* to discuss your needs. We can assist you in the following ways:

- Graphic design of the following promotional materials:
 - Posters
 - Tickets
 - Save the dates
 - Print advertisements
 - Other materials are available upon request
- Promotion of your event in the following ways:
 - Posting on BBBS St. Catharines website
 - Social media posts on Facebook, Instagram and Twitter

Big Brothers Big Sisters of North and West Niagara cannot assist you in the following ways:

- We **cannot** provide you with media coverage and support
- We **cannot** print any of the promotional materials for your event
- We **are not** liable for any costs associated with printing or the booking of advertising for your event
- All materials and event promotion completed by the third party organizer **must be approved** by the Marketing & Communications Officer (see Fundraising Guidelines #3)

- Big Brothers Big Sisters of North and West Niagara **cannot** provide sponsor/donor/volunteer contact information lists for third party events for the use of promotion due to our privacy policy.

Obtaining a raffle license

According to the Ontario Gaming and Liquor Commission, a raffle is a lottery event in which prizes are awarded based on a random draw of tickets purchased by players. Only licensed charitable events or religious organizations can conduct raffles.

If the following three elements are present, a raffle license is required:

- Tickets are sold (consideration)
- Random chance to win (chance)
- Prizes are rewarded (prize)

Some common examples of raffles requiring a license are:

- 50/50 draw
- Prize draw
- Football squares

If any of the three elements (consideration, chance and prize) is not present, the contest of draw may not require a license. For example, the following do not require a raffle license because skill is involved rather than a random change to win:

- Silent auction
- Jelly bean counting contest
- Hole-in-one putting contest

Big Brothers Big Sisters of North and West Niagara is eligible to obtain a raffle license for a total ticket value of \$10,000 and less. Big Brothers Big Sisters of North and West Niagara will supply your event with a raffle license provided you have given us the following information at least 14 days prior to your event:

- Draw format (i.e. 50/50, prize draw etc.)
- Draw date
- Draw location
- Ticket colour
- Unit price (i.e. 1 ticket for \$3, 3 tickets for \$5)
- Ticket quantity
- Total value (amount must not exceed \$10,000)
- Prize descriptions(s)
- Retail value of each individual prize

Please note that the Ontario Gaming and Liquor Commission requires that all raffle tickets must be collected at the event and handed in to Big Brothers Big Sisters of North and West Niagara to be kept for two years after the event.

To request a raffle license, please contact the Fund Development Officer by phone at 905-646-3230 x231 or by email at Jorie.zavitz@bigbrothersbigsisters.ca.

Tax Receipting

What will Big Brothers Big Sisters of North and West Niagara provide a tax receipt for?

Big Brothers Big Sisters of North and West Niagara adheres to the Canada Revenue Agency (CRA) Income Tax Act when issuing charitable tax receipts. To learn more about charitable tax receipts, please visit <http://cra-arc.gc.ca>. Issuing inappropriate charitable tax receipts can put our charitable status in jeopardy.

Under CRA guidelines, a “gift” is a:

Voluntary Transfer of Property with a conscious desire to make a gift (as distinguished from giving something for nothing by mistake or under pressure).

- Voluntary – given of free will (not compelled, not court ordered, etc.)
- Transfer – from donor to charity/qualified donor (complete transfer)
- Property – cash or gifts in kind (not services)

Big Brothers Big Sisters of North and West Niagara will provide a tax receipt for the following:

- Direct personal or corporate donations of \$15 or over
- In-kind donations where fair market value is easily determined
 - Tickets (sporting events, theatre, ballet, etc.) where the value is either noted on the ticket or a payment receipt is provided.
 - Air miles or payment of flights (again, proof of payment must be provided)
- Gifts of artwork provided the artwork has been appraised by a third party appraiser – appraisal must be included with the donation
- Gifts of shares
- Bequests
- Life insurance premiums
- Monthly donations (donor will receive one cumulative income tax receipt at the end of the calendar year)

Big Brothers Big Sisters of North and West Niagara cannot provide a tax receipt for the following:

- Gifts of promises or pledges (for example, gift certificates donated by the issuer, hotel accommodation)
- Payment of basic fee for an event

- Gifts where the value or benefit of the donation cannot be determined
- Lottery or raffle tickets
- Donations of services (time, skills, or efforts) or loans of property, use of a timeshare or lease of premises
 - Donations of services will only be receipted when a 'cheque exchange' takes place. This means that the party who donated a service would invoice Big Brothers Big Sisters of North and West Niagara for the cost of the services. Big Brothers Big Sisters of North and West Niagara would then issue a cheque for the services. If the service provider should choose to donate these funds back to Big Brothers Big Sisters of North and West Niagara, then Big Brothers Big Sisters of North and West Niagara can issue a tax receipt for the amount of the donation.
 - Two distinct transactions must take place:
 - A person provides a service to Big Brothers Big Sisters of North and West Niagara and is paid for that service, and
 - That same person makes a voluntary gift of property to Big Brothers Big Sisters of North and West Niagara
- Funds or gift in kind is from another qualified donor (gifts from other registered charities, or non-profit organizations)
- Name of true donor(s) cannot be determined (for example, bottle collection from several parties, donation bins, etc.) – one person cannot benefit from gifts made by multiple donors
- Gift is directed to a specific person or family unless Big Brothers Big Sisters of North and West Niagara has already decided that person or family is the recipient of the charitable program and Big Brothers Big Sisters of North and West Niagara has full discretion to reallocate funds and the person or family is arms-length from the donor
- Rent-free space
 - One of the criteria for a gift is that there be a voluntary transfer of property
 - With rent free space or accommodation, no property is being transferred – instead, use of the building is being provided. Since no property is transferred, no “gift” is made and a tax receipt for the value of the loan of property cannot be issued
- Court ordered donations (donations made as a condition of parole)
- Gifts intended for another organization
- Donations of items for auction (unless pre- approved by BBBS St. Catharines)
- Sponsorships

Notes:

Frequently Asked Questions

Will Big Brothers Big Sisters of North and West Niagara help organize events?

If you need some assistance in helping plan an event, we would love to hear from you. Make an appointment with our Fundraising & Business Development Manager who will explain our *Big Team Connect* to help you start the planning process.

Is Big Brothers Big Sisters of North and West Niagara able to support any third party event expenses?

It is the responsibility of the event organizers to create a budget and manage it accordingly for all expenses.

Can Big Brothers Big Sisters of North and West Niagara provide volunteers for a third party event?

Volunteers from Big Brothers Big Sisters of North and West Niagara are subject to availability (see Fundraising Guidelines #12). It is the responsibility of the event organizers to recruit, train and manage all volunteers.

Can Big Brothers Big Sisters of North and West Niagara provide sponsorship contacts to support third party events?

Big Brothers Big Sisters of North and West Niagara cannot provide sponsor/donor lists for third party events due to our privacy policy. Big Brothers Big Sisters of North and West Niagara may be able to provide minimal prizes for a silent auction but will be determined on a case by case basis by the Fundraising & Development Manager. It is the responsibility of the event organizer to request support from individuals or businesses to underwrite costs.

Who is responsible for all liability and legal risks associated with my event?

Big Brothers Big Sisters of North and West Niagara will not be responsible for any damage or accidents to any persons or property; we will not assume any legal or financial liability caused before, during or after the event. Depending upon the nature of the third party event, the organizer may be required by Big Brothers Big Sisters of North and West Niagara to submit proof of general liability insurance in the amount of \$5,000,000 or such other amount which covers any damage or accidents to persons or property arising out of the third party event. In acquiring insurance for an event, it is the responsibility of the organizer to apply and obtain such documents in the name of the individual, organization or business coordinating the event. Big Brothers Big Sisters of North and West Niagara will not sign any contracts with vendors or suppliers. It is advisable that you seek guidance and direction from your own insurance broker on this matter.

Will Big Brothers Big Sisters of North and West Niagara help promote third party events?

Yes, we will include it in on the events section of our website as well as Facebook and Twitter. Any additional promotion is up to the event organizers. All publicity for the proposed event must be approved by Big Brothers Big Sisters of North and West Niagara prior to being printed and/or released, including: web content, press releases, and printed materials. Please forward all content for approval at minimum 7 days in advance of release to the Communications & Events Coordinator by calling 905-646-3230 x232 or email josh.mckernan@bigbrothersbigsiseters.ca.

How do I send the proceeds of my event to Big Brothers Big Sisters of North and West Niagara?

Funds raised by a third party event should be made payable and turned into Big Brothers Big Sisters of North and West Niagara no later than 30 days after the event. It is preferred that all funds raised are deposited into one account and a cumulative cheque is written to Big Brothers Big Sisters of North and West Niagara. If Big Brothers Big Sisters of North and West Niagara provided the event with a raffle license, the license and paperwork will need to be returned to the agency immediately following the event. Funds raised by the raffle can be included in the cumulative cheque, but the agency will need to know the specific amount raised by the raffle to ensure proper reporting to the Ontario Gaming and Liquor Commission. Cash must be in a sealed envelope, counted, with a count sheet detailing the funds included. Please make cheques payable to:

Big Brothers Big Sisters of North and West Niagara
428 Niagara Street
St. Catharines, ON
L2M 4W3

Attn: Jorie Zavitz

Can I use the Big Brothers Big Sisters of North and West Niagara logo and how do I get it?

Yes, please complete the appropriate checkbox on the *Third Party Event Application Form*, and the logo will be emailed to you by the Marketing & Communications Officer.

Can Big Brothers Big Sisters of North and West Niagara provide print and promotional/display materials?

Big Brothers Big Sisters of North and West Niagara can provide print materials about our programs and services. We may also be able to provide banners, subject to availability. Please provide us with all requests for Big Brothers Big Sisters of North and West Niagara materials a minimum of ten days prior to your event by email to the Fundraising & Business Development Manager by calling 905-646-3230 x231 or email Jorie.zavitz@bigbrothersbigsisters.ca

Do I need any licenses to host an event? (Raffle, liquor, etc.)

Big Brothers Big Sisters of North and West Niagara will assist the event organizers with raffle licenses. Please see the detailed information in *Fundraising Guidelines* and *Obtaining a Raffle License*. Any additional licenses required such as liquor licenses, etc. are the responsibility of the event organizers. You must be able to provide proof of adequate licenses to Big Brothers Big Sisters of North and West Niagara.

Will I have access to Big Brothers Big Sisters of North and West Niagara media contacts?

No. It is the responsibility of the event organizers to promote their own events.

If I have a silent auction at my event, how do I get items for the auction?

It is the responsibility of the event organizer to solicit for prizes to support your event. We can provide a letter from Big Brothers Big Sisters of North and West Niagara authenticating your event to support your solicitation efforts. If you require a letter from Big Brothers Big Sisters of North and West Niagara authenticating your event, please email your request to the Director of Fund Development by calling 905-646-3230 x231 or email jorie.zavitz@bigbrothersbigsisters.ca.

There are many ways to build your live and/or silent auction:

- 1) Donated Items - Create an ask letter to send to various companies requesting items for your auction that is in support of Big Brothers Big Sisters of North and West Niagara.
- 2) Auction Houses – There are companies that build inventories of items for silent/live auctions, such as sports memorabilia, music collectables, etc. You are typically only required to pay for items that sell, and can return any items that don't. Reminder: Set minimum bids for these items to ensure that you are selling them for more than you are paying for them.
- 3) Purchased – You always have the option of purchasing items for the auction, however, the cost of these items are the responsibility of the organizers.

Third Party Event Application Form

Event Name: _____

Date: _____ Time: _____

Location (Address/Facility/City): _____

Contact Name: _____ Contact Phone: _____

Contact Address: _____ Postal Code: _____

Contact Email: _____

Expected Revenue: _____ Expected Number of Attendees: _____

Description: _____

Would you like a Big Brothers Big Sisters of North and West Niagara representative to attend the event (circle one)? Yes / No

If yes, what involvement will they have? Please note this is subject to availability.

Speech Cheque Presentation Press Conference Other: _____

Additional details: _____

Would you like to use the Big Brothers Big Sisters of North and West Niagara logo on your event promotional material or need some help in creating event materials? If Yes, our PR & Communications Officer will be in touch with you.

Yes / No

ACKNOWLEDGMENTS

I acknowledge that Big Brothers Big Sisters of North and West Niagara reserves the right to withdraw its name from the event at any time. I acknowledge that I have read and understand the information contained in the Big Brothers Big Sisters of North and West Niagara Third Party Event Toolkit and will adhere to all Fundraising Guidelines.

Applicant Name

Applicant Signature

Date

BBBSNWN Staff Name

BBBSNWN Staff Signature

Date

Return form to jorie.zavitz@bigbrothersbig sisters.ca within 14 days prior to your event

