

## FUNDRAISER EVENT GUIDELINES FORM

These guidelines should be used when organizing a fundraising EVENT that is a “one-time” or annual EVENT that takes place (1) one day or consecutive days (a weekend) I.E. a concert, a car wash, a murder mystery or dinner party, etc.

Thank you for your interest in organizing a fundraising event (“the Event”) in support of Answering TTP Thrombotic Thrombocytopenic Purpura Foundation (“the Foundation”).

Every Event, big or small, makes a difference as we pool funds to most effectively benefit TTP research and patient care.

Many of these events are hosted by individuals or organizations that want to make a special contribution to help in answering TTP.

For approved community Events, the Third Party Event Organizer(s) (“Event Organizer(s)”) and the Foundation are required to adhere to the following guidelines:

### 1. Foundation Approval Process

The Foundation and Event Organizer(s) will ensure that fundraising events do not proceed without prior approval of the Foundation’s Event Proposal Form, any contractual agreement required by the Foundation and execution of this Guideline by the Event Organizer(s) and the Foundation. Contracts between the Foundation and the Event Organizer(s) will reflect the requirements and principles in this Guideline.

### 2. Liability and Accountability

- The Event Organizer(s) will:
  - Provide a record of revenues and expenses
  - Provide periodic status updates to the Foundation on an agreed-upon basis
  - The Foundation will not be responsible for any financial losses or unsettled accounts of the Event Organizer(s) or fundraising Event.
  - The Foundation will be advised if the Event is to benefit other charitable organizations, who these are, and what percentage of the final net revenue they will receive
  - The Foundation will be provided with reasonable prior notice of any third party Event cancellation
  - No oral or written commitments will be entered into by the Event Organizer(s) on behalf of or in the name of the Foundation

- All contracts of the Event Organizer(s) relating to the Foundation must be submitted to the Foundation for review and approval prior to signing

### **3. Financing**

- In accordance with the Foundation's legal obligations to comply with Canada Revenue Agency guidelines, the Foundation will not underwrite any third party Event

### **4. Insurance**

- The Foundation will not provide insurance coverage for any third party Events
- The Foundation will not assume any legal or financial responsibility relating to the fundraising event or Event Organizer(s)
- The Foundation is not responsible for any damage, theft or accidents to individuals or property

### **5. Licenses and Fees**

- Third party Events involving licenses and fees will abide with all government regulations and applicable laws. Adequate time must be given to the Foundation to review all applications. The Event Organizer(s) will pay for all applicable licensing and/or permit fees and costs.

### **6. Product Endorsement**

- The Foundation does not normally endorse products. However, if the Foundation approves a fundraising Event involving the sale of a product, the relationship between the Foundation and the product must be clearly defined to the public. Signage, hand tags, labels and or display materials must state the following:  
**“(Event Name) is pleased to support Answering TTP Foundation. A portion of the proceeds from the sale of this product will benefit Answering TTP Foundation.”**

### **7. Event Promotion and Solicitation**

- The Foundation will have final, signed approval on ALL promotional materials including brochures, flyers, advertisements, publicity and/or media communications relating to its participation in the fundraising Event
- The Event Organizer(s) is responsible for making all media contacts and must ensure that it is clear that the Foundation is not the organization requesting media coverage and/or participation
- The Foundation will, at its discretion and depending on supplies and reasonable requirements, provide existing in-house promotional materials
- The Foundation will not provide any donor contact lists

- The Foundation will not provide any door prizes, raffle prizes, silent auction items or gift bags
- All sponsorship solicitation lists must be reviewed and approved by the Foundation

#### **8. Use of the Foundation Name and Logo**

- The Foundation will, in its discretion and upon prior written approval, allow the use of its name and logo by the Event Organizer(s) to promote the Event.
- Any use of the logo must be approved, in writing, prior to its use
- The Foundation reserves the right to withdraw the use of its name at any time and will not assume any costs or liabilities that may be involved in doing so

#### **9. Post Event Financial Summary**

- Within 30 days after the Event, the report must be submitted to the Foundation together with the Net Revenue raised.

#### **10. Tax Receipts**

- The Foundation will have tax receipts issued in accordance with CRA regulations
- Receipts cannot be issued by the Foundation
  - for proceeds of an Event; receipts are issued only for direct cash donations where the donor receives no benefit for the contribution
  - for gift-in-kind expenses related to the Event, unless previously approved in writing by the Executive Director and related directly to the event
  - when the purpose of any gift-in-kind donations for which a charitable receipt is requested, is not previously approved by the Foundation
- Documentation to support tax receipting for donations must be provided to the Foundation within 30 days of the Event
- Event Organizer(s) must provide a complete and legible list of donors to the Foundation which includes:
  - First and last name
  - Address, including city and postal code
  - Amount given
  - Amount tax receipt to be issued for
  - List and value of any benefits received for donation
  - Any other information reasonably required by the Foundation
- The Foundation will issue tax receipts to individual donors and business acknowledgement letters to organizations that make donations to the Event
- Tax receipts will only be issued by the Foundation for cash donations of \$25.00 or greater

- Sales of raffle tickets, admission tickets, green fees, auction items and other goods that provide a benefit to donors are not eligible for a tax receipt from the Foundation, except when an admission fee exceeds the Fair Market Value (FMV) of the benefits received.
- A tax receipt may be available for a portion of the fee if a fee exceeds the Fair Market Value (FMV) of the benefits received. This must be discussed and approved by the Foundation well in advance of the Event date.
- A tax receipt cannot be issued for services by the Foundation including personal, professional or legal services
- The Foundation may issue a business acknowledgement letter to event sponsors.

#### *Gift in Kind*

- A gift of property other than cash is referred to as a “gift-in-kind”. The Foundation will issue a gift-in-kind charitable donation receipt to individuals and a business acknowledgement letter to businesses provided that the Event Organizer(s) supplies adequate documentation to verify the Fair Market Value of the item(s) donated. At the discretion of the Foundation, items of little value will not qualify as a gift-in-kind.
- Fair Market Value will be established by providing the Foundation with:
  - A purchase invoice or other proof of purchase of the item
  - An independent third party appraisal and value of the item. All costs of appraisal are borne by the Event Organizer(s).
  - A current price list for the item at a recognized commercial enterprise operating independently of the donor
- Individuals who request charitable tax receipts for Gifts in Kind will also have to complete the CRA three year holding declaration.

The total amount of receiptable donations the Foundation is able to receipt for an event cannot exceed the total Net Revenue that the Foundation receives from the Event

#### **11. Sponsorship**

- The Foundation will have final, signed approval of Event sponsors
- The Foundation will not solicit sponsors on behalf of the Event Organizer(s), nor will it provide contacts for sponsorship
- Any third party contacting potential sponsors must disclose the nature of the third party arrangement and must position the Foundation as a recipient of the Event proceeds, not the host or sponsor of the Event.

#### **12. Staffing**

- The Event Organizer(s) will provide all necessary staffing and volunteers for the Event unless otherwise agreed in a contract with the Foundation

- The Foundation will not guarantee staff representatives to attend or participate in the Event

**13. Privacy**

- The Foundation is committed to adhering to the requirements of the Federal Privacy legislation (PIPEDA) and requires that these requirements be adhered to by the Event Organizer(s) and associated employees, contractors, agents and volunteers.
- All information obtained and used by the Foundation will be treated with the utmost confidentiality and security in accordance with Foundation policies.

I have read, understand and agree to be bound by the Events Guidelines as identified above.

Authorized Signature of Event Organizer \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Signature of the Foundation \_\_\_\_\_ Date: \_\_\_\_\_