



## **Third-Party Event Policy and Guidelines**

We greatly appreciate your interest in organizing a fundraising event in support of Shelter Movers. Shelter Movers defines third-party fundraising as “an external fundraising activity run by outside supporters whose proceeds are directed to Shelter Movers.” Established in 2016, Shelter Movers is a registered Canadian charity (registered CRA charity 776372492RR0001).

Shelter Movers supports women and their children who are fleeing gender-based violence (GBV) by providing free moving and storage services. To ensure events associated with Shelter Movers are in keeping with our mission and mandate, we ask that third parties adhere to these guidelines. Please review the information below before planning your event.

### **Approval Process**

Agreements between Shelter Movers and the Event Organizer will reflect the requirements and principles in this guideline.

### **Liability and Accountability**

The Event Organizer(s) will adhere to the following:

- Provide Shelter Movers with a record of revenues, expenses, and copies of receipts;
- Provide periodic status updates to Shelter Movers on an agreed upon basis;
- Shelter Movers will not be responsible for any financial losses or unsettled accounts of the event organizer or fundraising event;
- Shelter Movers will be advised if the event is to benefit other charitable organizations, who they are, and what percentage of the final net revenue they will receive;
- Shelter Movers will be provided with reasonable prior notice of any third-party event cancellation;
- The Event Organizer will not enter into any oral or written agreements on behalf of or in the name of Shelter Movers.

### **Fundraising Practices**

Volunteers who solicit or receive funds on behalf of Shelter Movers adhere to Imagine Canada’s Ethical Fundraising and Financial Accountability Code and other applicable codes of ethics and standards of practice:

- Act with fairness, integrity, and in accordance with all applicable laws;
- Discontinue solicitation of a prospective donor who identifies the solicitation as harassment or undue pressure or does not wish to be solicited;
- Immediately disclose to Shelter Movers any apparent or actual conflict of interest/loyalty and do not accept donations for purposes that are inconsistent with Shelter Movers’ mission.



## **Financing**

In accordance with Shelter Movers' legal obligations to comply with CRA guidelines, Shelter Movers will not underwrite any third-party event.

## **Insurance**

- Shelter Movers will not provide insurance coverage for any third-party events;
- Shelter Movers will not assume any legal or financial responsibility relating to the fundraising event or event organizer;
- The Event Organizer must provide proof of insurance, if requested;
- Shelter Movers is not responsible for any damage, theft, or accidents to individuals or property.

## **License and Fees**

Any third-party events involving licenses and fees will comply with all government regulations and applicable laws. Shelter Movers must be given adequate time to review all applications. The Event Organizer(s) are responsible for payment of applicable licensing and/or permits and costs.

## **Event Promotion and Solicitation**

- Shelter Movers will have approval on the presentation and usage of the Shelter Movers logo;
- The Event Organizer(s) is/are responsible for making all media contacts and must ensure that it is clear that Shelter Movers is not the organization requesting media coverage and/or participation;
- Shelter Movers will, at its discretion and depending on supplies and reasonable requirements, provide materials such as brochures, etc. Any leftover brochures will be returned to Shelter Movers;
- Shelter Movers will not provide any donor contact lists;
- All sponsorship/donation lists must be reviewed and approved by Shelter Movers.

## **Use of the Shelter Movers Name and Logo**

- Shelter Movers will, in its discretion and upon consultation, allow the use of its name and logo by the event organizer(s) to promote the event;
- Shelter Movers reserves the right to withdraw the use of its name at any time and will not assume any liability or costs in doing so.

## **Tax Receipts**

- Shelter Movers may issue tax receipts in accordance with CRA guidelines;



- Shelter Movers issues two kinds of receipts – charitable tax receipts and “gift in-kind” receipts;
- Shelter Movers will provide an Excel template to capture all donor information for all events.

### **1. Charitable Tax Receipts**

- A tax receipt is issued to a donor who makes a personal contribution to a registered charity. The donation must be made directly to Shelter Movers (e.g. cheque made payable to Shelter Movers) and without personal benefit to the donor;
- Purchase of admission tickets, green fees, and other goods that provide a benefit to donors are not eligible for a tax receipt from Shelter Movers, except when an admission fee exceeds the fair market value (FMV) of the benefits received. For example, a tax receipt may be available for a portion of the admission price if a ticket or entrance fee exceeds the fair market value (FMV) of the benefits received. This must be discussed and approved by Shelter Movers well in advance of the event date;
  - Fair market value will be established by providing Shelter Movers with:
    - a) A purchase invoice or other proof of purchase of the item;
    - b) An independent third-party appraisal and value of the item. All costs of appraisal are borne by the Event Organizer(s);
    - c) A current price list for the items at a recognized commercial enterprise operating independently of the donor;
    - d) Individuals who request charitable tax receipts for gifts-in-kind will also have to complete the CRA three year holding declaration.
- Shelter Movers will only issue tax receipts for a donation valued at \$20.00 or more. Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the event organizer;
- Net funds raised from the third-party event must be submitted to Shelter Movers no later than 30 days after the event. At this time, donor information for those requiring and eligible for tax receipts must be submitted with the following information:
  - Donor’s address (including postal code);
  - Donor’s telephone number (including area code);
  - Amount of donation;
  - Donor’s email address.

### **2. “Gifts in-kind” Receipts**

- Shelter Movers may issue a gift-in-kind (gift of property other than cash) 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 (e.g. purchase receipt, invoice, or appraisal). This would be the case for silent auction items;

- A tax receipt cannot be issued for gifts of services to Shelter Movers (e.g. donated time, labour, including personal, professional, or legal services);
- A tax receipt cannot be issued to event sponsors. If requested, sponsors can receive a letter of acknowledgement for the value of their sponsorship, which they can use against their business expenses.

### **Sponsorship**

- Decisions regarding the final, signed approval of event sponsors will be made in consultation between Shelter Movers and event organizer(s);
- Shelter Movers 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 Shelter Movers as a recipient of the event proceeds, not the host or sponsor of the event.

### **Staffing**

- The Event Organizer(s) will provide all staffing for the event unless otherwise agreed in a contract with Shelter Movers;
- Shelter Movers will not guarantee staff or volunteer representatives to attend or participate in the event, although Event Organizers may request the presence of Shelter Movers volunteers, staff, or board members.

### **Privacy**

All information obtained and used by Shelter Movers will be treated with the utmost confidentiality and security in accordance with Shelter Movers policies.

Thank you for raising funds in support of Shelter Movers!

Your dedication, passion and commitment are greatly appreciated.

*(see below for signature page)*



Name of Third-Party Fundraising Event: \_\_\_\_\_

Date: \_\_\_\_\_

I, \_\_\_\_\_ (PRINT NAME), the undersigned have read and understand the above noted policy and guidelines. I agree to enter a partnership with Shelter Movers freely and of my own accord, and will adhere to the rules and regulations of hosting a Third-Party Event as outlined in this document.

\_\_\_\_\_

Signature - Third-Party Event Organizer

\_\_\_\_\_

Printed Name - Shelter Movers  
Representative

\_\_\_\_\_

Signature - Shelter Movers Representative

Date: \_\_\_\_\_