

## **Guidelines for Individuals or Groups Wishing to raise funds in support of Gillian's Place**

Gillian's Place is pleased to have the support of individuals and community organizations who want to plan events in support of our organization. The following guidelines are intended to clarify and support you in your efforts. In addition to following these guidelines, please speak with the Development Office at Gillian's Place before holding any major event or fundraising campaign and be sure to submit a Third Party Event Proposal form at least 90 days prior to proposed date of fundraiser.

### **First Step – Develop a Proposal for your Fundraising Project**

In the interest of protecting our reputation and charitable status, the attached **Proposals must be completed in full and submitted to the Development Office at least 90 days prior to the event.** The Fundraising and Event Coordinator in the Development Office of Gillian's Place will act as a consultant during the process of developing your proposal and in the planning and executing of your event.

The Development Office at Gillian's Place assesses and approves all fund raising initiatives from the community. The proposals are reviewed using the following criteria:

- Compatibility with existing Gillian's Place events
- Standards of accountability, stewardship, taste and inclusion, in keeping with Gillian's Place policies, mission, vision and values
- Self-sufficiency
- Understanding and support of Gillian's Place mission by third party event organizers.

The Development Office reserves the right to recommend changes to the original submission and to reserve approval based on those amendments being adopted. They may also return submissions without approval to community organizers where further clarification or amendment is needed.

Once your proposal has received approval, you will be notified in writing and a copy of the final, approved submission is sent as a written agreement between you/your organization and Gillian's Place.

The Development Office will review your list of prospective sponsors/contributors/suppliers and may remove names in order to avoid multiple or inappropriate solicitations.

Please note that the availability of donor/prospect lists is governed by the policies relating to privacy and security of donor information established by the agency and encoded in the Gillian's Place Fund Raising Guidelines and in the Code of Ethics of the Canadian Centre for Philanthropy. Under no circumstances will donor names be made available to outside groups or individuals by Gillian's Place. Please note that all gifts accepted must meet the criteria established in existing policies, e.g., Policy with respect to the Acceptance of Non-Monetary Gifts, and Revenue Canada guidelines.

### **Your Role as Community Organizer**

- Prepare a full written proposal for submission to the Development Office according to guidelines provided by Gillian's Place
- Make changes or additions to original proposals as requested by the Development Office for approval
- Develop all materials for the event and submit for review by the Development Office. **All promotional materials including Gillian's Place name and/or logo must be approved by Gillian's Place before published. This includes posters, flyers, advertisements and packaging tags.**
  - It must be clear on all materials that Gillian's Place is the beneficiary of your efforts and the amount or percentage of proceeds which will be allocated. For example "50% of proceeds will be donated to Gillian's Place."
- Facilitate and manage event
- Arrange for secure handling and delivery of any gifts received directly, including name and address of donor
- Pay any up-front costs of the event that are not designated as being paid by the agency in the approved event submission
- Liaise regularly with Development Office
- Undertake to act within the accepted standards for Gillian's Place

### **The Role of Development Office of Gillian's Place St. Catharines**

- Act as liaison for members of the community interested in initiating a fund raising project in support of Gillian's Place
- Review prospect and potential sponsor/supplier lists for conflicts with other planned solicitations and do all the data work to purge inappropriate prospects
- Advise on strategy being developed for event
- Approve any materials being used for event
- Receive and present proposals to Development Office
- Arrange for donor recognition as agreed prior to event commencement
- Allocate funds to designated accounts
- Discuss with organizers at the end of the event for evaluation

### **PLEASE NOTE:**

**Any/all costs and any tasks associated with the execution of the event is the sole responsibility of the contracted Third Party unless otherwise agreed upon prior to event commencement.**

In keeping with Canada Revenue Agency (CRA) policy, a tax receipt cannot be issued in every circumstance. After reviewing the completed Third Party Event form, we will be able to determine if a tax receipt may be issued.

For more information, please visit Canada Revenue Agency (CRA) website at:

[www.cra-arc.gc.ca/tax/charities/glossary-e.html](http://www.cra-arc.gc.ca/tax/charities/glossary-e.html)

**Again, thank you for actively participating in our work by holding a fundraising event. Your efforts are not only appreciated, but vital to the success of our organization. Please do not hesitate to call with questions or for support.**