

# Third Party Event Guidelines

Your event will affect countless individuals in the Caledon and Dufferin area. No matter how large or small, your contribution will make a big impact in supporting the lives of our clients. It is important to note that Family Transition Place (FTP) must ensure that all Third Party Events run on our behalf support our organizational objectives and promote a positive public image, and are consistent with our mission statement and values. By providing us with a completed **Third Party Event Contract**, we will be aware of your plans and will know how best we can assist you.

Please read the following guidelines:

Complete the Third Party Event Contract and submit to FTP 4-6 weeks prior to your event for review and to confirm that it does not conflict with other events in the community—**ALL THIRD PARTY EVENTS NEED TO BE APPROVED BY FTP PRIOR TO THE EVENT TAKING PLACE.**

1. Once the Third Party Event Contract has been reviewed and approved, FTP will request that this document be signed by both parties.
2. All event proceeds must be received by FTP within 30 days of the event.
3. Full contact information for donors must be sent to FTP within 30 days of the event for tax receipts to be issued (if eligible—see **Tax Receipt** section).
4. A post-event financial summary must be sent to FTP within 30 days of the event—you are responsible for keeping accurate records of the event.
5. FTP will not assume any legal or financial liability including but not limited to financial losses or unsettled accounts associated with the event.
6. FTP 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.
7. No oral or written commitments will be entered into by the event organizer on behalf of or in the name of FTP.
8. FTP will not assume any legal or financial responsibility relating to the fundraising event or the event organizer.
9. FTP is not responsible for any damage, theft or accidents to individuals or property.

Thank you for your  
interest in supporting  
Family Transition Place.  
We couldn't do what  
we do without you!

You are responsible for the following:

Your own mailing list for the special event

- Obtaining all necessary permits, licences or insurance\*
- Arranging pick up and delivery of FTP promotional materials (banners, brochures, etc.) from FTP contact
- Obtaining prior approval from FTP before asking a business or company for a donation of goods or services for your event
- Notifying FTP if the event is cancelled prior to the scheduled event day

*\*Third Party Events aren't part of FTP operations and as we aren't running/organizing/controlling them, there isn't any coverage under our insurance policy for the group individual planning the event.*



**Questions?** Please call 519-942-4122, ext. 243.

# Third Party Event Guidelines

## How we can help:

We are grateful for your support and enthusiasm and are available to assist you in the following ways:

- Provide you with the contact information for an FTP representative who will act as a liaison between FTP and your event coordinator.
- Supply an approved FTP logo to be used on all of your promotional material—no party may use the FTP logos without consent of the Development and Community Relations Department.
- FTP must review and approve all promotional material prior to its production and distribution. This includes, but is not limited to, invitations, press releases, newspaper or newsletter articles, etc.
- Provide agency-specific support material to be made available at the event (e.g., flyers, brochures, handouts, banners, etc.).
- Prepare and send thank-you letters to all donors who provided contact information.
- Issue tax receipts directly to donors (if eligible—see **Tax Receipt** section below).
- Recognize your event in the next issue of our newsletter and internal online update.
- Information about FTP can be easily found online at [www.familytransitionplace.ca](http://www.familytransitionplace.ca), or you can contact us directly if you can't find what you are looking for on our website.
- Distribute event information to FTP contact list via e-blast (for events with anticipated revenue of \$5,000+).
- If you wish to have our brochures or banner at your event, please let us know so we can arrange a time for you to pick them up. Our banners are used at different events throughout the year and we asked that they are returned to us in the same condition as when you received them. We require a credit card imprint be left with us when borrowing a banner and if it is not returned in the same condition, \$150 will be charged to that credit card for repair/replacement. Please provide FTP with two weeks notice if organizational brochures are required for your event as we only carry a limited supply.

## Tax Receipts:

Fundraising events that are not run by FTP, or where FTP does not have control over the monies that are earned, are considered “third party events” by Canada Revenue Agency. As such, FTP cannot issue tax receipts for the proceeds received. Under certain circumstances and if all CRA criteria is met and it is pre-arranged, it may be possible for FTP to issue tax receipts to donors for eligible amounts of the gift.

FTP works very hard to protect its CRA status, which makes it important for us to follow all of their criteria to the letter. This can, in some cases, make our involvement in Third Party Events quite restrictive. We work hard to be as honest, compliant and transparent as possible. Other charities may not covet their status with the same vigor.



# Third Party Event Contract

## CONTACT INFORMATION

Organization Name:

Contact Name:

Address:

City: Province: Postal Code:

Phone: Fax: Email:

Company Website (if available):

Please select a category that best describes your group/organization:

Corporation  School  Community  Service Club  Individual

## GENERAL EVENT INFORMATION

Event Name:

Event Description:

Date(s): Time:

Location & Address:

Is this event open to the public? Yes No

## PAST EVENTS

Have you previously organized an FTP third party event? Yes No

If yes, briefly describe the event:

How much money was raised?

Will any other charities receive proceeds from the event? Yes No

If yes, who:

Do you plan on using FTP's name and logo in your event promotion? Yes No

Please note that FTP must approve any and all name and logo usage and have final approval prior to printing.

What kind of FTP promotional materials will be required?

Brochures  Posters  Display Screens  Website

Other:



# Third Party Event Contract

## FINANCIAL INFORMATION

In an effort to assist you in the preparation of a successful event, please indicate how you will generate revenue for FTP:

Ticket Sales/Entry Fees	Raffle Draws	Live/Silent Auction	Cash Donations
Sponsor	Merchandise Sales	Other	

If generating income through Ticket Sales/Entry Fees, please indicate what percentage will be donated?

Anticipated event revenue:

Will this be an annual event?                      Yes                      No

## FTP INVOLVEMENT

Due to staff numbers and other events organized on behalf of FTP, staff and volunteers cannot provide support to plan and promote events. FTP will do whatever possible to ensure that staff and/or volunteers will be available to attend the event, but requests for such a presence will be handled on a case-by case basis and cannot be guaranteed.

FTP will advertise your event for 30 days prior to your event date on the FTP agency website—  
[www.familytransitionplace.ca](http://www.familytransitionplace.ca).

## MARKETING AND PROMOTIONS

The marketing and promotion of Third Party Events must be done by the Event coordinator. Upon approval of your event, FTP will post it in the Events section of our website. Approval must be obtained for the use of the FTP name and logo, and FTP must pre-approve all promotional materials before distribution, including, but not limited to flyers and press releases. All materials must clearly indicate that the event is in support of FTP.

It is important that the FTP name and logo be used correctly and spelled properly. Always refer to the organization as Family Transition Place.

Please submit this form within 4–6 weeks prior to your event.

By submitting this application, I am requesting that FTP review and approve this event. I understand that by signing this document, I will be required to follow FTP’s Third Party Event Guidelines and they will be binding on me as the event organizer.

Print name \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Applicant(s) \_\_\_\_\_

*FTP staff info below.*

Print name \_\_\_\_\_ Date: \_\_\_\_\_

Event Approval Signature \_\_\_\_\_