

Policies, Criteria and Guidelines for Independent Third Party Fundraising Events

In accordance with revenue Canada guidelines and for the benefit of Epilepsy Ottawa and the Third Party Event Organizer, Epilepsy Ottawa has established the following:

Policies:

Third Party events are required to:

- Be consistent with the mission and values of Epilepsy Ottawa
- Maintain a positive presentation and give Epilepsy Ottawa positive exposure and increased public awareness
- Benefit Epilepsy Ottawa operations and programs

Epilepsy Ottawa reserves the right to:

- Refuse involvement, and the use of its name and logo, in any event that does not meet with its expressed approval
- Relinquish support of any third party event that does not abide by the policies, criteria, and guidelines set out in this agreement without any liability or obligation

Criteria:

The Director and/or Board of Directors of Epilepsy Ottawa will approve a third party fundraising event and sign the agreement with the Third Party Event organizer(s) based on compliance with the following:

1. Notice

Epilepsy Ottawa requests three weeks advance notice of third party fundraising events. Please complete the attached Third Party Fundraising application. Once your fundraiser had been approved, we will send you a letter of approval that must be signed and returned no later than one week before the event.

2. Consistency of the third party event with Epilepsy Ottawa's mission and values.

3. Profitability of the third party event.

4. Positive marketing/public relations exposure.

Guidelines:

For approved third party events/promotions, the Third Party Event Organizer(s) and Epilepsy Ottawa are required to adhere to the following guidelines:

1. Epilepsy Ottawa Brand

It is important for Epilepsy Ottawa to maintain brand integrity and consistency in dealing with the public. Epilepsy Ottawa requires Third Party Event organizers to follow these branding guidelines:

- **Epilepsy Ottawa Name**
We are Epilepsy Ottawa in English communications and Ottawa Épilepsie in French communications. In any promotion materials, please refer to us as such. Epilepsy Ottawa should be listed as the beneficiary not as a supporter or sponsor.
- **Logo and Logo Use**
Epilepsy Ottawa's logo is the sole property of Epilepsy Ottawa and therefore, it's used only with the expressed permission of Epilepsy Ottawa. Usage is limited to the approved event. Epilepsy Ottawa reserves the right of final approval of any event materials containing the logo.
- **Promotional Materials**
Epilepsy Ottawa must review and approve ALL promotional materials (brochures, flyers, advertisements, public and media communications) to ensure they meet the requirements outlined in our policies and criteria.
- **Epilepsy Information**
Any information provided about epilepsy must either be produced by Epilepsy Ottawa or be approved by Epilepsy Ottawa.

2. Donations and Sponsorships

Please provide a list of sponsors who have donated to or sponsored your event and include a description of their donation and/or sponsorship plus retail value. This allows Epilepsy Ottawa to better recognize partners in our community. Epilepsy Ottawa will not solicit on behalf of the Third Party Event Organizer(s), nor will they provide contacts for sponsorships. **Epilepsy Ottawa DOES NOT provide tax receipts for third party event sponsors.**

3. Licenses, Insurance and Financing

Epilepsy Ottawa will not underwrite any third party event. Epilepsy Ottawa insurance will not cover third party events. All required licences for your event must be obtained by the Third Party Organizer(s). Epilepsy Ottawa will not provide or apply for licenses.

4. Staffing and Volunteers

The Third Party Organizer(s) will provide all staffing and recruitment of volunteers for said event.

5. Accountability

Third Party Event Organizer(s) will:

- Provide full finance report to Epilepsy Ottawa
- Provide periodic status reports to Epilepsy Ottawa on an agreed-upon basis
- Provide reasonable notice of any third party event cancellation
- Will inform Epilepsy Ottawa if the third party event is to benefit other charity partners
- Will be responsible for any financial losses or unsettled accounts

Third Party Event Organizer(s) will not:

- Name Epilepsy Ottawa in any contract

6. Photographs / Feedback from Third Party Fundraisers

Epilepsy Ottawa reserves the right to display any photos or quotes from individuals participating in events or third party events to be displayed on Epilepsy Ottawa website, Facebook page, bulletin board, posters, brochures and/or promotional materials.

Tax Receipts and Gift Acknowledgements

Epilepsy Ottawa may provide receipts for income tax purposes, for donations incurred through the third party event, and for which documentation has been provided, and further, only if said donations are deemed receipt able by Revenue Canada. Epilepsy Ottawa reserves the right to issue or not issue any receipts at its sole discretion.

A tax receipt is given to people who make a personal donation to a registered charity. The donation must be made directly to Epilepsy Ottawa (i.e. cheques payable to Epilepsy Ottawa) and without personal return. One will not get a tax receipt for purchasing a ticket to an event, buying an auction item or raffle ticket, etc. Third Party Organizer(s) will not receive a tax receipt for donation.

We require the following information to properly process a tax receipt:

- Donor's Name
- Donor's Address (including postal code)
- Donor's Telephone Number (including area code)
- Amount of Donation

Epilepsy Ottawa is happy to provide tax receipts for donations of \$10 and over. Processing tax receipts takes 4 -6 weeks after the donation has been received by our office.

Gifts In Kind

Gifts In Kind are gifts of property, other than cash and marketable securities. These include (but are not limited to) gifts of supplies, equipment, books, artwork. Gifts in Kind **not eligible** for tax receipts include gifts of professional/personal service of an individual, gifts by a company of its principal product or service, donation of old clothes or furniture, etc.

For more information on Gifts and Income tax, you can visit the Canadian Revenue Agency's website at <http://www.cra-arc.gc.ca/>.

Thanks again for raising funds for Epilepsy Ottawa!

Third Party Fundraising Activity Application

Date of Submission: _____

Name of Group/Company Hosting the Event: _____

Contact Person: _____

Mailing Address: _____

City: _____ Postal Code: _____

Phone #: _____ Fax #: _____

E-mail: _____

Event Name: _____

Date of Event: _____ Expected Attendance: _____

Social Media Links for the event: _____

Briefly describe the event: _____

Briefly describe how you will be raising funds for Epilepsy Ottawa: _____

Proposed Budget

All costs must be paid from the proceeds of the event or by the event organizer directly. No expenses will be paid by Epilepsy Ottawa. Please list all of the anticipated expenses and indicate if there are confirmed donations of same.

Location: _____

Entrance Fee: _____

Food/beverages: _____

Sponsorship: _____

Printing: _____

Other Revenue (specify): _____

Advertising: _____

Prizes: _____

Other (specify): _____

Total Expenses: _____

Total Revenue: _____

Total Donation to Epilepsy Ottawa (Revenue – Expenses): _____

I have read the attached Third Party Fundraising Events - Policies, Criteria and Guidelines and agree to follow them with regards to holding the proposed event to benefit Epilepsy Ottawa. By publicly advertising Epilepsy Ottawa as the recipient of the proceeds of this event, I agree to provide the full amount of the proceeds within 30 days of the event.

Signature of Applicant: _____ Date: _____