



**Big Brothers Big Sisters**  
of Toronto

## **Third Party Events**

### **Guidelines and Agreement Form**

**August 2011**



**United Way**  
Toronto

A United Way member agency



## Third Party Event Guidelines and Agreement Form

Thank you for your interest in supporting Big Brothers Big Sisters of Toronto (BBBST) by hosting a third party event. In order to assist you with the planning and execution of a successful event, we ask that you read the Third Party Event Guidelines and fill in the Agreement Form.

THIS APPLICATION MUST BE APPROVED BY BBBST PRIOR TO PUBLICIZING OR HOLDING THE EVENT. WHERE POSSIBLE, PLEASE SUBMIT AT LEAST **1 MONTH** PRIOR TO YOUR EVENT.

### Guidelines

Thank you for choosing Big Brothers Big Sisters of Toronto (BBBST) as a recipient of your fundraising event. Community support is the key to our success and we recognize the efforts it takes to organize and hold an event on our behalf.

In order to help your event run more smoothly we have created third party event guidelines for fundraising events held on behalf of BBBST. If you have any questions, please do not hesitate to contact our office at 416-925-8981 ext.4122.

#### What BBBST requests of third party event organizers:

- Contact BBBST to register new events or update us on continuing events. It is important that our agency is aware of all events that are held in support of our programs.
- It is the event organizer's responsibility to communicate to sponsors, participants and the general public that BBBST is not conducting the event, but is the **beneficiary** of the event.

#### BBBST can provide the following assistance once your event has been approved by our office:

- Advice and expertise on event planning
- Attendance of a BBBST representative, when appropriate and available
- Event listing on our website
- A support letter that validates the authenticity of the event/organizer, from date of issue until the event is complete
- Limited supplies, such as information brochures, bookmarks and other promotional material

#### BBBST cannot provide the following:

- Funding or reimbursement for event expenses
- Donor or sponsor lists
- Promotion or advertising of your event except on our website
- Guaranteed attendance of staff or volunteers at your event

- Application for gaming licenses, e.g., bingos, raffles, liquor, insurance
- Prizes, auction items, awards
- Tax receipts for cash or in-kind goods that were not directly received by BBBST  
(Please also see information on tax receipts)

#### **Other Guidelines:**

- All third party events require completion and approval of a **Third Party Event Agreement Form**
- All publicity (including media releases, print/promotional materials, etc.) for the proposed event must be approved by BBBST prior to being printed, released, etc.
- The BBBST name and logo may not to be used by a third party/community event on an ongoing basis (i.e. on a website or on promotional material), unless permission in writing has been granted to the third party by BBBST
- The event organizer will obtain all necessary permits, licenses and insurance for their event
- All funds and tax receipt information, if approved to issue receipts (i.e. contact information for receipting), must be received by BBBST within 30 days after the event
- If the event is cancelled, please notify BBBST at least one week prior to the event
- BBBST shall have the right at any time and for any reason to request that the event organizer/Third Party cease use of the name Big Brothers Big Sisters of Toronto in connection with the event and the event organizer/Third Party shall use its best efforts to comply with such request
- BBBST will not assume any legal or financial liability at a community event
- BBBST is not responsible for any damage, accidents to persons or property at a community event

#### **Tax Receipt Guidelines**

It is very important that you understand the rules about tax receipts BEFORE you plan your event. For further clarification on what can be receipted, you can speak with a BBBST representative. It is your responsibility to communicate with donors regarding tax receipts.

BBBST will only issue tax receipts for the amount of the actual donations received by our agency. Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the organizer.

BBBST is permitted to issue tax receipts to individuals that make a donation without receiving a tangible item or benefit in return. Tax receipts are provided for donations of \$25.00 or more.

**Tax Receipts will be issued for Third Party Events:**

- Provided BBBST receives a statement showing all revenues and expenses from the event
- Provided the event organizer ensures that the amount of money collected after expenses is sufficient to cover the amount of money for which receipts have been requested
- All other CRA conditions are met

**Tax Receipts will not be issued:**

- For the purchase of admission tickets, green fees or auction items
- For in-kind goods donated to an event
- For donated services such as hiring an entertainer or auctioneer for an event
- For sponsorship, as advertising or promotion (a tangible benefit) is being received in return for the payment
- Gift certificates donated by the issuer of the certificate

**Please note:** Sponsors and other corporate contributors may be provided with a business gift letter as proof of contribution. Often, a charitable tax receipt is neither required nor appropriate for this group of contributors.



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**Event Organizer Contact Information:**

Main Contact Name for Event	
Organization Name (if applicable)	
Address	
City/ Province/Postal Code	
Phone (day) work / home	
Phone (evening) work / home	
Phone (day of event)	
Email	
Additional Contacts (please list)	

**Event Details**

Name of Event	
Event Description	
Event Date	
Time of Event	
Location of Event (include address)	
Fundraising Goal \$	

What factors made you choose BBBST as the benefactor of your event?

Is there a BBBST volunteer connection?

Including this year, how many years have you held this event in support of BBBST?

How would you like to be recognized? (Please note that all events that raise over \$1,000 are recognized on the BBBST website and in the quarterly newsletter)

**Internal / Website Promotion**

**\*\*Please note that BBBST must approve all promotional materials and use of the BBBST logo\*\***

How will you publicize the event? (Please attach samples of publicity materials)

Website URL (if applicable):

Would you like to be listed under the Upcoming Events Section on the BBBST Website? If yes, please include details.

**BBBST Involvement**

BBBST Rep(s) Requested?	No / Yes
How Many Reps?	
Time of BBBST Rep(s) Arrival	
Length of Time Required	
Dress Code	
BBBST Rep(s) Role/Responsibilities (if applicable)	
Will there be a cheque presentation?	No / Yes
Speaking Opportunity /Speech	No / Yes
Requested length of speech	

**\*\*Please note that we will make every effort to have a BBBST representative at your event if requested but we cannot always guarantee attendance of staff or volunteers\*\***

**Promotional Materials: Items Requested**

Banner	No / Yes	
Posters	No / Yes	Quantity (max ??)
Brochures	No / Yes	Quantity (max ??)
Newsletters	No / Yes	Quantity (max ??)
Donation Cards	No / Yes	Quantity (max ??)
Other		

***\*\*Please note that if you request a banner, it must be returned to the BBBST office upon completion of the event\*\****

Please indicate when you require these requested items? (Day of Event OR Prior to event - please specify a date)

**Additional Information**

Does your event require liquor or gaming licenses? No / Yes

**Additional Notes / Comments**

Please note that the Gaming Services Act (GSA) regulates the following events. (Bingos, Raffles, Monte Carlos/Casinos, 50/50 Draws & Alcohol Permits)

Please allow at least 10 weeks to process liquor or gaming applications, which fall under the third party event organizers responsibility.

We ask that you please read the BBBST Third Party Event Guidelines before signing this form.

**Projected Budget**

Projected Gross Revenue:

Projected Expense:

Projected Net Revenue:

**Please note** that we realize these figures are **estimates**. Please use your best guess; we will not hold you to these numbers. This is meant to be a tool to help you determine your fundraising goals. Depending on the nature of your event, some expenses may or may not apply. **All event costs must be paid either directly by the organizer or by come out of the event proceeds.**



**PLEASE READ THE FOLLOWING AND SIGN:**

**I have spoken to a BBBST representative about tax receipting and the CRA Guidelines as it relates to the planning of this event. I have read and understand the BBBST Third Party Event Guidelines as well as my role as an event organizer.**

This event in no way represents a joint venture or partnership.

By signing below, I agree that all publicity (including media releases, print/promotional materials, etc.) for the proposed event must be approved by BBBST prior to being printed, released, etc.

BBBST shall have the right at any time and for any reason to request in writing that the Third Party cease use of the BBBST logo in connection with the event and the Third Party shall use its best efforts to comply with such request.

It is understood that BBBST in no way endorses any products or services used in connection with the event and shall not be held liable for any damages, costs, injury to the person or property or any other loss from the event.

The Third Party will indemnify, defend and hold BBBST harmless from all claims, causes of action and damages of any kind arising out of or in connection with the community event, including but not limited to property damage or personal injury or other cause of action of any kind arising out of or in connection with the event.

Note: A signed copy of this contract must be on file at BBBST before proceeding with your event. Tax receipts will not be issued unless you have discussed your event with a BBBST representative. Please note that a full event accounting is required before tax receipts can be issued.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Director, Marketing & Fund Development \_\_\_\_\_ Date \_\_\_\_\_