



Third Party Fundraising

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Policy Level: Fundraising

Townsend Smith Foundation relies on the generous support of the community to support its mission to provide access to palliative care for residents of North Halton.

PURPOSE

Townsend Smith Foundation ("TSF") is grateful to be the beneficiary of proceeds from Third Party Events ("Third Party Event(s)" and "Third Party" are defined at page 3, herein). To ensure compliance with Canada Revenue Agency (CRA) and to be supportive of interested Third Parties wanting to raise funds to support TSF, the following Third Party Fundraising Guidelines have been developed (the "Policy").

Procedure:

1. Parties interested in undertaking a Third Party Event fundraising activity in support of TSF will be provided with a copy of this Policy and associated Guidelines.
2. The TSF logo can only be used for Third Party Events with the written permission of TSF. TSF requires that any materials be shared with TSF for sign-off before publishing.
3. Third Party Events and activities that cannot be supported include:
 - i) Programs that raise money on commission;
 - ii) Events involving the promotion or support of a political party or candidate, or those which may appear to endorse political activity;
 - iii) Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or internet);
 - iv) Gaming activities, such as 50:50 draws and lotteries, requiring an (Alcohol and Gaming Commission of Ontario) AGCO or other government license in the name of Townsend Smith Foundation;
 - v) Establishing a bank or other deposit or transaction account in the name of Townsend Smith Foundation;



4. TSF cannot share mailing lists or contact information of donors, clients, or families in accordance with privacy obligations.
5. TSF can only generate official charitable tax receipts according to the tax receipting procedures in compliance with CRA Guidelines. TSF will not provide receipts if payment is made to the event organizer or where TSF is in receipt of the net proceeds of an event (however, TSF may issue an invoice/receipt for expense purposes).

Tax receipts cannot be issued for:

- Purchase of goods (i.e., greens fees, admission tickets, auction items, raffle tickets or other goods that provide a benefit);
- Gifts of services – donated time or labour;
- Items for which a CRA value cannot be validated;
- Event sponsors/sponsorship;

Due to the complexity of the CRA documentation, receipts at a Third Party event or activity will only be issued for donations of twenty dollars (\$20) or more made directly to TSF, where there is no benefit to the donor and nothing is given in return, if the following information is provided:

- Contact information of the donor, including full address and name, and email address or phone number;
- Donation amount;
- Method of payment (cheque or credit card is preferred, with cash accepted).

6. Provision of Tax Receipts will adhere to the CRA requirements

Responsibility: Fundraising, Board, Staff

Consequences: Reputation, CRA audit

Related Documents: Ethical Fundraising and Social Responsibility Policy.



Townsend Smith Foundation – Third Party Fundraising Guidelines

We thank you for choosing Townsend Smith Foundation (“TSF”) as the beneficiary of your Third Party Event fundraiser and for your commitment to the organization.

What is a Third Party Event?

Third Party Events or activities are those created, managed and run by any person or entity that is not Townsend Smith Foundation, including, but not limited to, individuals, service clubs, businesses or groups (the “Third Party”) for the purpose of raising funds to benefit Townsend Smith Foundation. Hosting a Third Party Event is a wonderful way to show your support for our mission to build a hospice in North Halton.

Third Party Events have the following general characteristics:

- Proceeds are designated to Townsend Smith Foundation;

No Third Party revenues or expenses flow through Townsend Smith Foundation.

- Planning, funding, and executing event activities including any license, permit or insurance liability requirements is the responsibility of the Third Party.
- Townsend Smith Foundation’s name and logo may be used with permission in advertising to state Townsend Smith Foundation is the designated recipient of the specified amount/percentage of event proceeds.
- Minimal supportive involvement from Townsend Smith Foundation staff or volunteers.

The Need

The existing number of residential hospice locations in Ontario do not currently meet the needs of palliative care patients, particularly in the North Halton communities. To establish the first residential hospice in North Halton, we are dependent on the generosity of the community and fundraising to raise significant funds to build a facility. Government funding is not sufficient to address the costs of building a community hospice. Once built, Townsend Smith Foundation must continue to raise funds to operate, sustain, and provide the highest quality care and programming with no cost to residents and families.



Events and Activities We Cannot Support

While the options for Third Party Events and fundraising activities are extremely varied, there are a few activities Townsend Smith Foundation has prohibited in conjunction with Third Parties:

1. Programs and efforts that raise money with commission attached.
2. Events involving the promotion or support of a political party or candidate, or those which may appear to endorse political activity.
3. Direct solicitation (including but not limited to door-to-door canvassing, telemarketing, or internet).
4. Charitable gaming, such as 50/50 draws or lotteries, requiring an AGCO or other government license, where the Third Party does not have an AGCO license in its own name.
5. Establishing a bank or other deposit or transaction account in the name of Townsend Smith Foundation.

What Townsend Smith Foundation Can Do to Help

(Note that all items are provided at the exclusive discretion of Townsend Smith Foundation)

1. Share information about your event at our Awareness Committee meetings and on our social media channels, our website, and in our e-newsletter where appropriate, and at our discretion.
*Make us aware of the particulars by emailing us at events@townsend-smith.ca, ideally more than thirty (30) days in advance.
2. Provide you with a letter of support, at our discretion, which can be used to validate the authenticity of the event and its organizers. The endorsement letter may help with sponsorship or other donations for your event.
3. Provide limited existing Townsend Smith Foundation promotional and educational materials for your event.
4. Provide the official Townsend Smith Foundation Logo for use on promotional materials, at our discretion.
5. Provide tracking sheet for donations of twenty dollars (\$20) or greater made directly to Townsend Smith Foundation.
6. Make efforts to attend your event if you desire (representation may be in the form of volunteers and/or Board Members, as available, and will be coordinated with our fundraising team members events@townsend-smith.ca).
7. Share the results with the broader community with a cheque presentation, if desired.

*Due to privacy obligations, Townsend Smith cannot share mailing lists or contact information of donors, clients, or families.



Promotion and Logo Usage

The Townsend Smith Foundation name and logo should be on all appropriate promotional materials for the sole purpose of communicating that TSF is the recipient of proceeds from the event. Townsend Smith Foundation reserves the right to review promotional materials prior to production or distribution, including invitations, brochures, letters and flyers, and limit logo use at our discretion.

Tax Receipts

Townsend Smith Foundation can only generate official charitable tax receipts according to the tax receipting procedures in compliance with Canada Revenue Agency (CRA) Guidelines. Townsend Smith Foundation cannot provide tax receipts if payment is made to the event organizer or where Townsend Smith Foundation is in receipt of the net proceeds of an event. Tax receipts cannot be issued for:

- Purchase of goods (i.e., greens fees, admission tickets, auction items, raffle tickets or other goods) that provide a benefit;
- Gifts of services (donated time or labour);
- Event sponsors.

Due to the complexity of the CRA documentation, receipts at a Third Party Event or activity will only be issued for donations of twenty dollars (\$20) or more made directly to Townsend Smith Foundation, where there is no benefit to the donor and nothing is given in return, if the following information is provided:

- Contact information of the donor, including full address and name, and email address or phone number;
- Donation amount;
- Method of payment (cheque or credit card is preferred, with cash accepted).

Townsend Smith Foundation is happy to provide a tracking sheet for donation, if requested.

Donating money after the event

If possible, please avoid submitting donations in cash. Cheque or electronic transfer are the preferred method for submitting donations.

All monies raised from a Third Party Event should be remitted within thirty (30) days of the event.

Please send cheques to Townsend Smith Foundation, 420 Main Street, Box 489, Milton, ON L9T 5C3 or e-transfer to admin@townsend-smith.ca



Thank you for your Support

Once again, thank you for your interest in planning a fundraising event to benefit Townsend Smith Foundation; we really appreciate your support!