

	POLICIES (P) AND PROCEDURES (PR)		
NUMBER: PR45	ORIGINAL DATE:	DATE REVIEWED:	
TITLE: THIRD PARTY FUNDRAISING		DATE REVISED: November 2023	

1.0 PURPOSE

In accordance with the Board’s policy on Donor Engagement to ensure that individuals and groups interested in conducting third party fundraising for SERC have the appropriate supports and information to do so, and that funds are collected according to provincial and federal law, and in accordance with SERC’s vision, mission and values.

2.0 DEFINITIONS

2.1 Executive Director (ED)

The term Executive Director (“ED”) refers to the individual or individuals who singly (ED) or jointly (Co-EDs) occupy the role of Executive Director.

3.0 PRINCIPLES

4.0 PROCEDURE

4.1 Approval

4.1.1 Any individual or group interested in hosting a third party fundraiser is to complete an application (See Appendix 6.1) and submit it to the Director of Development for review

4.2 Responsibilities

4.2.1 The Executive Director will be responsible for approval or denial of all fundraising events associated with SERC and ensuring that all organizational policies and federal and provincial laws are complied with. The Director of Finance and Human Resources is responsible for ensuring all applicable tax and receipting laws and procedures are followed.

4.3 If the event is approved, the following guidelines must be followed:

a) Promotion and Logo Usage

SERC will provide its logo upon approval of the event along with guidelines for logo usage. All promotional materials must be designed and printed or posted to the web by the third-party organizers. In naming the event or promotion, SERC must not be used in the title, but should be listed as the beneficiary of the event. For example, organizers may not refer to the event as the “the SERC Bowl-A-Thon” but it can be promoted as “Bowl-A-Thon in support of SERC”. SERC may promote the event, where appropriate, through our website, social media sites, e-mails or newsletter and will provide informational material on request.

b) Financial Guidelines

- SERC cannot solicit sponsors for third-party fundraising event and does not provide any donor contact information.
- Third-party fundraisers are responsible for paying all fundraising expenses related to their activity. It is recommended that event expenses should be 30% or less of the total amount raised, excluding any in-kind donations.
- No bank accounts in the name of SERC shall be set up. SERC cannot process any credit card transactions for third-party fundraising events.
- Any promotion that donates a portion of its sales must state clearly how much, in percentage or dollar amount, will go to SERC.
- Some fundraising activities, such as raffles, that involve selling to the general public, may need a licence. Check with your local or municipal governments.
- SERC does not approve individuals soliciting funds door-to-door or by telemarketing.
- SERC does not provide sponsorship to non-SERC events except in situations where we are purchasing seating or participating in an event that is important to our community and/or partners
- All cheques should be made payable to SERC and sent within 30 days of the event.
- Donations over \$10 made in cash or by cheque (made payable to SERC) are eligible for charitable gift receipts. If receipts are requested, the names, addresses, postal codes, phone numbers and amounts of donations must be recorded and submitted with the donations. Note that an individual may not receive a gift receipt for money that was not donated by them (i.e. an individual cannot receive a receipt for monies raised at an event).
- Registered Charity # **107848343RR0001**.

c) Cancellation, Liability and Changes

- SERC endorses fundraising events that respect the positive image of our organization and complement our mission. We reserve the right to deny or withdraw approval of an event if there are serious concerns about the impact on our organization’s image.

- By submitting your fundraising idea, you agree to assume all risks and liabilities associated with the proposal and hereby release and hold harmless SERC, its directors, officers, employees, agents and successors from and against any and all claims, damages, liabilities, costs and expenses, arising out of or may occur in conjunction with the proposal. By receiving information on your fundraising idea, SERC is not obligated to enter into a fundraising event with you.
- You must advise SERC of any changes in your fundraising event. If circumstances warrant, SERC reserves the right at any time to ask you to cancel a fundraising event or remove our name from your event. If an event is cancelled you agree to release SERC from any and all liability in connection with such action.

5.0 REFERENCE

6.0 APPENDICES

6.1 Appendix – Third-Party Fundraising Application Form