



ROBERTS/SMART CENTRE (RSC) - THIRD PARTY EVENT TOOLKIT

Fundraising Guidelines

1. RSC encourages fundraising events that are compatible with our mission, vision and values. Prior approval to hold a third party event is required. Approval is based on the type, theme and financial viability of the event. RSC reserves the right to withhold the use of its name and logo from any event, initiative, promotion, performance or presentation it feels is inappropriate.
2. To conduct a fundraising event, the third party organizer (the “Organizer”) is required to complete and submit RSC’s *Third Party Event Application Form* at least thirty (30) days prior to the fundraising event.
3. Any organization/group wishing to use the RSC name or logo on any materials, including advertising, must receive prior written approval from RSC.
4. All promotional materials must state that the fundraising event is “in support” of RSC and is not an official RSC event.
5. Taking commission, for any purpose, on funds raised as part of a third party event is prohibited.
6. The Organizer is responsible for meeting all municipal/provincial or federal standards and for fulfilling all legal authorization(s), permit(s), license(s), precaution(s) and/or general liability insurance required to organize the event. RSC must not be party to any liability coverage without prior knowledge and/or approval, which RSC may withhold at its sole discretion. RSC accepts no legal responsibility and cannot be held liable for any risk, injury or otherwise.
7. RSC agrees to provide the Organizer with appropriate recognition, as mutually agreed by RSC and the Organizer.
8. The Organizer will be responsible for all costs related to the event and will handle all monies until the official donation is submitted to RSC. Event expenses are to be deducted before sending proceeds to RSC. RSC shall incur no costs related to the third party event unless otherwise agreed in writing prior to the event.
9. The Organizer agrees to handle all monetary transactions for the event and to present the net proceeds to RSC within fourteen (14) days of event completion, or as may be otherwise agreed in writing with RSC. Cash funds must be turned in to RSC no later than three (3) days after the event.
10. When tax receipts are requested, the Organizer is responsible for collecting the names, addresses and contact information of all donors, and is required to mail the appropriate materials to RSC within 30 days of event completion.



11. RSC will issue official income tax receipts in accordance with Canada Revenue Agency guidelines.
12. Involvement of RSC staff and volunteers is at RSC's discretion and will be based on availability, location and the nature of the event.
13. The Organizer agrees to ensure that all materials borrowed from RSC are returned promptly and in the same condition they were received. The Organizer agrees to accept responsibility for damage or loss of materials borrowed from RSC.
14. RSC will not be responsible for mailing materials to attendees/participants or volunteers, other than the mailing of applicable tax receipts.
15. The Organizer must send to RSC a complete accounting of all income and expenses associated with the event. By publicly naming RSC as the beneficiary of the event, the Organizer is required to donate the net proceeds to RSC within fourteen (14) days of event completion. Cash funds must be turned in to RSC no later than three (3) days after the event. Cash must be in a sealed envelope, counted, with a count sheet detailing the funds included.

Cheques are to be made payable to:

Roberts/Smart Centre
1737 Woodward Drive, Suite 104
Ottawa, Ontario
K2C 0P9

Attention: Shannon Flynn, Director of Finance



Frequently Asked Questions (FAQ)

Will RSC help organize events?

We simply don't have enough resources to provide direct assistance; however, we have created this *Third Party Event Toolkit* to help you start planning your event.

Is RSC able to support any third party event expenses?

It is the responsibility of the Organizer to create a budget and manage it accordingly for all expenses.

Can RSC provide volunteers for a third party event?

It is the responsibility of the Organizer to recruit, train and manage all volunteers.

Can RSC provide sponsorship contacts to support third party events?

RSC cannot solicit sponsors or provide sponsor/donor lists for third party events. It is the responsibility of the Organizer to request support from individuals or businesses to underwrite costs.

Who is responsible for all liability and legal risks associated with my event?

RSC will not be responsible for any damage or accidents to any persons or property; we will not assume any legal or financial liability caused before, during or after the event. Depending upon the nature of the third party event, the Organizer may be required by RSC to submit proof of general liability insurance in the amount of \$1,000,000 or such other amount which covers any damage or accidents to persons or property arising out of the third party event. In acquiring insurance for an event, it is the responsibility of the Organizer to apply and obtain such documents in the name of the individual, organization or business coordinating the event. RSC will not sign any contracts with vendors or suppliers. We strongly advise the Organizer to seek guidance and direction from its own insurance broker on this subject.

Will RSC help promote third party events?

Yes, we will include it in the events section of our website as well as our Facebook page. Any additional promotion is up to the Organizer. All publicity for the proposed event must be approved by RSC prior to being printed and/or released, including: web content, press releases, and printed materials. Please forward all content for approval at minimum ten (10) days in advance of release to the Third Party Event Coordinator by calling Catherine Van Vliet at 613-728-1946 ext. 222 or email cvanvliet@rsc-crs.com.

How do I send the proceeds of my event to RSC?

Funds raised by a third party event should be made payable and turned in to RSC no later than fourteen (14) days after the event. It is preferred that all funds raised are deposited into one account and a cumulative cheque is written to RSC. Cash funds must be turned in to RSC no later than three (3) days after the event. Cash must be in a sealed envelope, counted, with a count sheet detailing the funds included.

Please make cheques payable to:

Roberts/Smart Centre

1737 Woodward Drive, Suite 104

Ottawa, Ontario

K2C 0P9

Attention: Shannon Flynn, Director of Finance



Can I use RSC logo and how do I get it?

Yes, please complete the appropriate checkbox on the *Third Party Event Application Form*, and the logo will be emailed to you.

Can RSC provide print and promotional/display materials?

Regrettably, our budget doesn't have room to provide this type of assistance; however, depending on the timing and location of the event, we may be able to provide a self-standing banner. Please send all banner requests a minimum of ten (10) days prior to the event by email to Catherine Van Vliet, the RSC's Executive Director at cvanvliet@rsc-crs.com.

Do I need any licenses to host an event?

RSC is not able to assist with obtaining any licenses that may be required, including raffle and/or liquor licenses. All licensing requirements are the responsibility of the Organizer. Proof of adequate licensing may be requested by RSC prior to the event.

Will I have access to RSC's media contacts?

It is the responsibility of the Organizer to promote their own events.

If I have a silent auction at my event, how do I get items for the auction?

It is the responsibility of the Organizer to solicit for prizes to support the event. We can provide a letter from RSC authenticating the event in support of solicitation efforts. Please email all requests for authentication letters to Catherine VanVliet, the RSC's Executive Director at cvanvliet@rsc-crs.com.

Ways to build live and/or silent auctions include:

- 1) Donated Items - Create an ask letter to send to various companies requesting items for your auction that is in support of RSC.
- 2) Auction Houses – There are companies that build inventories of items for silent/live auctions, such as sports memorabilia, music collectables, etc. You are typically only required to pay for items that sell, and can return any items that don't. Reminder: Set minimum bids for these items to ensure that you are selling them for more than you are paying for them.
- 3) Purchased – You always have the option of purchasing items for the auction; however, the cost of these items is the Organizer's responsibility.

What will RSC provide a tax receipt for?

RSC adheres to the Canada Revenue Agency (CRA) Income Tax Act when issuing charitable tax receipts. To learn more about charitable tax receipts, please visit <http://cra-arc.gc.ca>. Issuing inappropriate charitable tax receipts can put RSC's charitable status in jeopardy.

RSC will provide a tax receipt for the following:

- Direct personal or corporate donations of \$20 or over (unless otherwise requested by the donor)
- In-kind donations where fair market value is easily determined:
 - Tickets (sporting events, theatre, ballet, etc.), where the value is either noted on the ticket or a payment receipt is provided.



- Air miles or payment of flights (proof of payment must be provided)
- Gifts of artwork, provided the artwork has been appraised by a third party appraiser and the appraisal is included with the donation
- Gifts of shares
- Bequests and/or life insurance premiums
- Monthly donations

RSC cannot provide a tax receipt for the following:

- Gifts of promises or pledges (for example, gift certificates donated by the issuer, hotel accommodation)
- Payment of basic fee for an event
- Gifts where the value or benefit of the donation cannot be determined
- Lottery or raffle tickets
- Donations of services (time, skills, or efforts) or loans of property, use of a timeshare or lease of premises, with the exception of situations where a 'cheque exchange' takes place.
- Funds or gifts in kind from another qualified donor (gifts from other registered charities, or non-profit organizations)
- Name of true donor(s) cannot be determined (for example, bottle collection from several parties, donation bins, etc.) – one person cannot benefit from gifts made by multiple donors
- Gift is directed to a specific person or family, unless RSC has already decided that person or family is the recipient of the charitable program and RSC has full discretion to reallocate funds, and the person or family is arms-length from the donor
- Rent-free space
- Court-ordered donations (donations made as a condition of parole)
- Gifts intended for another organization
- Donations of items for auction (unless pre-approved by RSC)
- Sponsorships

