



AIDS
Committee
of Windsor

AIDS Committee of Windsor (ACW)

Supporter Lead Event Guidelines

Dear Friend,

Thank you for considering the AIDS Committee of Windsor (ACW) in planning your next fundraising event.

The ACW is the only regional organization committed to reducing the burden of HIV/AIDS through funding research, providing client support, and promoting quality healthcare, education and outreach as well as increasing public awareness around harm reduction.

Since 1988, the ACW has provided client support, education and outreach, and harm reduction programs and services to the communities of Windsor-Essex & Chatham-Kent. However, it is still estimated that 75,000 Canadians still have HIV, and the number of Canadians currently at risk remains high in specific priority populations. There is much work to be done for those aging with HIV, as well as reducing stigma, and providing prevention education and outreach.

Enclosed within this package are all the contents that you will require to make your event a tremendous success.

It is through the kindness and generosity of local individuals and organizations that we are able to continue to bring in the proceeds that help us pursue our mission.

We thank you again for your support and consideration of our organization in your fundraising endeavor. If you have any questions, please feel free to contact me at 519-973-0222 ext.110.

We look forward to hopefully working with you!

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Brennan". The signature is fluid and cursive, with a long horizontal stroke at the end.

Michael Brennan
Executive Director
ACW

What is a Supporter Lead Event?

A supporter lead event can be defined as any fundraising initiative brought forward by an individual, community group, service club, or business external to the AIDS Committee of Windsor who wish to raise money through a planned activity that is designed, managed and financially resourced by the external participants.

Purpose of Supporter Lead Event Guidelines

The purpose of this package is to help existing and potential supporters of the AIDS Committee of Windsor with a unique reference source, guide and tool to ensure maximum potential and success for their pre-existing or proposed event.

It will also serve as an aide in the development of a clear process and road map while staying within parameters that properly present the brand identity of the agency, which are consistent in our event presentation, appearance and communications.

We thank you for your diligence in your review and adherence to all materials found herein and look forward to working with you toward the successful delivery of your event.

In this guide, you will find:

- Steps to hosting a successful supporter lead event
 - Tax receipting guidelines
 - Privacy legislation guidelines and forms
 - General release form
 - Parameters of support for assistance from the ACW
 - Supporter Lead Event application form
 - Contact information and application submission.
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Steps to Hosting a Successful Supporter Lead Event

1. Determine the type of event you would like to host

Talk with friends, family and colleagues to come up with an idea that is a good fit for you while keeping in mind your target audience. The type of event you choose should fit the size, interests, talents and time available to you and the individuals that you are working with.

Here are some ideas:

- Tournaments (golf/baseball)
- Dinners/Dances
- Raffles
- "A-thons" of any kind
- Social evenings
- Sporting events

2. Set goals

The enclosed budget form located within this guide will help you identify expenses as well as expected revenue. Please keep in mind that the lower your costs are, the larger your proceeds will be to the ACW.

3. Let us know about your event

Our fund development team wants to know all about your event and how we can best support you. Once you have your ideas including goals and objectives in place and decide on a concept for your event, please complete the enclosed proposal/budget form then send along to us for approval. A turnaround time of two weeks is to be expected.

4. Form a planning committee

Recruit dedicated and enthusiastic volunteers with a variety of skills so tasks can be divided appropriately to ensure that the event will be well organized. Have one person on the committee designated with the responsibility of ensuring that the direction and timing of the event is on track with its original plans that were created from the onset of the project.

5. Identify your audience

Knowing who will support and attend your event is very important to its success. Identifying your audience is crucial for promotion and where applicable, ticket sales.

6. Set the schedule

Keep in mind key holidays, time of day, location and other events taking place when setting your schedule. It should be convenient for those who will be attending the event. Make sure you have taken into consideration how much time you will need to plan the event.

7. Promote your event

Once you have identified your audience, you can then market to them. Flyers, posters, brochures, invitations, emails and social networking are all great tools to use. Always keep your budget in mind. We would be pleased to have your event materials display our name and/or logo but you must ensure you are using our identity correctly. If our name and/or logo appear on your materials please seek approval through us before use. Be sure to follow Privacy Legislation Guidelines as well in order to print the names of those connected to and/or sponsoring your event (see information enclosed within this guide on privacy legislation).

Publicity and promotion are key elements to hosting a successful event.

8. Event logistics

Large or small, all events need the same amount of care and organization in planning. Create a timeline or critical path. A checklist is a wonderful tool to have as well.

9. Collection of funds

We ask that you collect and submit all funds that are raised to the ACW within 30 days of your event. Tax receipts will be issued where appropriate (see information enclosed within this guide on charitable tax receipts).

10. Acknowledgement and Appreciation

Always remember to thank everyone who helped out and/or supported the event and let them know how much money was generated with their help including the difference made to People living with HIV/AIDS clients (PHA's) and their families.

11. Evaluation

Last but not least an evaluation of the event is important. Some questions that could be put forth are:

- Did the event/fundraiser go as planned?
- Did it achieve the goals that were set out in the beginning?
- What would you do differently next time?
- How could the event/fundraiser be improved?

Please submit an evaluation about your event within 30 days of its completion.

Tax Receipting Guidelines

Charitable Receipts

Tax receipting is often a confusing component of an event. Please review the following points carefully.

The ACW will issue charitable tax receipts if eligible. As a registered charity, we are required to follow the specific guidelines for issuing charitable tax receipts as requested by the Canada Revenue Agency (CRA).

Before identifying that a charitable receipt will be provided, please contact the ACW to ensure eligibility.

In most cases, we will require a full accounting of the event to confirm if all or a portion of the funds contributed are eligible to receive a receipt.

Revenue Recognition Definitions

Regional Agency Event: Receipted

A regional event is any event wherein the ACW plays one or more of the following roles:

- a. The ACW is the event host and is accountable for its delivery (regardless of the level of volunteer engagement);
- b. The event has budgeted expenditures that the ACW is solely accountable for;
- c. The ACW is responsible for all decision making related to the event;
- d. The ACW is asked to issue charitable tax receipts to individual donors that participate in an event and/or provides some level of technical, promotional or logistical support for the event.

With regards to point (d), the following is required: a third party event agreement must be completed that outlines the formula for allocation (i.e. all net proceeds; a portion of net proceeds, etc.) and the promotional support required from the ACW (i.e. posters, materials, volunteers, etc.). The ACW staff must also provide direction to the event host on any wording related to the eligibility of tax receipts. This type of event may also have a banking/finance role or insurance requirements which must be pre-approved through the third party event agreement with a full budget and clearly defined liability.

Examples:

An individual hosts a golf tournament for the ACW and donates net proceeds to the ACW; the ACW provides posters for the event, volunteers on site and issues tax receipts (based on eligibility) to the golfers.

A group of individuals plans a bike ride across Chatham-Kent to raise funds; the ACW provides promotions; pledge materials; an online giving page; bank deposit slips and other supports to facilitate the event delivery. All costs for the event are either paid for separately by the event hosts, or are defined and approved through the third party event agreement by the ACW as being deducted from the dollars raised.

In both of these events, there can be no designation for use of funds unless confirmed in advance by an authorized ACW staff member and clearly outlined in the third party event agreement. **The designation of the funds raised cannot be determined after the event.**

Supporter Lead Event: Receipted

A supporter lead event activity can be defined as any fundraising initiative brought forward by an individual, community group, service club, or business external to The ACW who wish to raise money through a planned activity that is designed, managed and financially resourced by the external participants. **Implicit in this definition is that the ACW is pre-advised of the event in writing.**

In these events, the ACW may have little or no involvement in the operation of the event. There may be charitable tax receipts issued by the ACW, however there are no financial services provided by the ACW, and no promotion/marketing or staff/volunteer involvement (except perhaps to collect a cheque and recognize/acknowledge the donation).

In this type of event, the determination of the allocation of funds (net proceeds only; percentage of net proceeds; exclusive beneficiary or one of many, etc.) is at the discretion of the individual or group hosting the event.

Examples:

An individual hosts a garage sale and decides to give all or a portion of the proceeds to the ACW. In this case, the individual could request a charitable tax receipt which would be based on CRA requirements.

Note: for accounting purposes, this would be considered an individual donation (and not a third party receipted event).

A local business hosts its own branded golf tournament and picks a different charity recipient every year to receive all or a portion of the net proceeds at their discretion. The business provides a list of the donors with required information to calculate the value of the charitable tax receipt. This must be done in compliance with CRA policies.

Note: When a fundraising activity is carried out by a third party with no pre-notification to the ACW prior to the event, the ACW cannot issue receipts to the attendees (e.g. an organization tells the ACW that they have run a golf tournament on our behalf, and would like tax receipts issued to the attendees).

Supporter Lead Event: Non-Receipted

Examples:

A group of children in a local school organize a fundraising activity (e.g. dress down for HIV/AIDS), and donate the proceeds to the ACW.

A restaurant chain runs a promotion and donates a portion of the meals sold to the ACW.

CRA Policy Commentary

Release Date

February 26, 2003

Reference Number

CPC - 026

Subject

Fundraising: supporter lead (third-party) fundraisers for the benefit of a particular registered charity.

Purpose

Provide clarification of the Directorate's policy regarding fundraising events for the benefit of a particular registered charity.

Definitions

Amount of advantage: the total value of all property, services, compensation or other benefits to which the donor of a property, or a person not dealing at arm's length with the donor, is entitled as partial consideration for, or in gratitude for, the gift.

Intention to give: the amount of the advantage that accrues to the donor does not exceed 80% of the fair market value of the property transferred.

Eligible amount of gift: the amount by which the fair market value of the property that is the subject of the gift exceeds the amount of the advantage, if any, in respect of a gift.

Commentary

Under the *Income Tax Act*, registered charities can issue official donation receipts to donors for gifts. This tax-receipting privilege is not to be casually farmed out to third parties, even if some of the resulting funds will be flowing back to the charity. A charity that substantially relinquishes to a third party its receipt-issuing function or the control over the funds that are donated to it can jeopardize its registered status.

A registered charity can enroll a supporter lead (third-party) organization or retain a fundraiser or other contractor as an agent to organize a fundraising event. However, the charity should maintain control over all monies that are earned as part of the event, and over the receipts that are issued for part of those monies.

If the charity does not run the event substantially by itself, through its own employees or volunteers, it should:

- a. Put in place a written agreement setting out the modalities of the fundraising arrangement
 - b. Ensure that official donation receipts are only issued to donors for the eligible amount of the gift
 - c. Ensure that official donation receipts are signed by an authorized individual in conformity with ss. 3501(1)(i), 3501(2), 3501(3) and 3502 of the *Income Tax Regulations*
 - d. Be able to provide to the Canada Revenue Agency a full accounting of the monies or that portion of the monies donated to it, and the receipts that were issued in return
 - e. Be able to account to the Canada Revenue Agency for the amount of the advantage received by the participants as a result of their participation in the fundraising event.
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Privacy Legislation Guidelines and Forms

Part One:

Anyone who signs up for your event and provides personal information, including a telephone number, mailing address or email address must have the option of choosing to not have their contact information used for any other ACW function or information mailing.

The "opt-out" phrase posted here (below) must be printed on any written document which asks people for their personal information. The opt-out clause may appear in smaller type than the rest of the form but must be easily read and clear. It does not need to have a title placed over it.

The ACW appreciates your support. At the ACW, our goal is to make giving simple. We recognize your right to privacy and we pledge to protect it. The information you have provided to us will be used to process your donation(s) and to provide you with a tax receipt. From time to time, we may use your contact information to keep you informed of other activities, events and/or fundraising opportunities in support of the ACW. If you do not wish to appear on our contact list, kindly check below:

I do not want to appear on the ACW contact list.

Part Two:

Privacy Legislation now requires that everyone who will have their name publicly associated with an event, through recognition activities or publications, sign a Privacy Form releasing the information.

Have all sponsors, donors or individuals being publicly named and associated with your event sign the attached release form. You can customize it for your use. All forms must be returned to the ACW offices for filing. We have attached a sample form which is completely filled out as well a blank form for your reference.

For example, an event honouring Joe Smith which has 10 sponsors would require release forms from Joe Smith and all 10 sponsor companies if you wish to have their names appear in posters, invitations, newsletter articles, media advertisements, etc. The sample form has all fields which require customized information or information from the person being named (i.e. sponsor) in bold.

SAMPLE - General Release Form

I wish to help the AIDS Committee o Windsor in its efforts to improve the quality of life for people living with HIV/AIDS.

I hereby consent to the use of the following items in conjunction with communications by The ACW addressed to the Canadian public and possibly on the internet (ACW web site and social networking sites).

name story voice photograph image
 statements writings other:

I understand that before the ACW makes any distribution of the communications wherein I am featured, I will be presented with the following information for my approval prior to any public distribution:

- Final proofs of the intended communications
- The purpose of the communications (e.g. fundraising, public education, etc.); poster, newsletter article and/or invitation
- Sections of Canada intended for distribution (e.g. country, province, city, etc.); Ontario
- Frequency and duration of the intended distribution; for 2014 event promotions
- The methods and media of distribution. Posters, newsletters, newspaper advertisements, letters and/or web site.

Name: Joe Smith

Address: 1234 Black Street South

City: Toronto Province: ON Postal Code: A7B 3X8

Telephone: (H) 555.555.5555 (W) 444.444.4444 Fax: 123.456.7890

I understand The ACW is a registered charitable organization and I agree that I will receive no financial benefit or other consideration of value for my consent which I hereby voluntarily give and have the full right to give.

JOE SMITH

Print Name

TODAY'S DATE, TODAY'S YEAR

Date

Joe Smith

Signature

Event Planner

ACW REPRESENTATIVE

Please duplicate this form and customize it for your use.

General Release Form

I wish to help the AIDS Committee of Windsor in its efforts to improve the quality of life for people living with HIV/AIDS.

I hereby consent to the use of the following items in conjunction with communications by the ACW addressed to the Canadian public and possibly on the internet (ACW web site and social networking sites).

name story voice photograph image
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I understand that before the AIDS Committee of Windsor makes any distribution of the communications wherein I am featured, I will be presented with the following information for my approval prior to any public distribution:

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- Sections of Canada intended for distribution (e.g. country, province, city, etc.); Ontario
- Frequency and duration of the intended distribution; for 2014 event promotions
- The methods and media of distribution. Posters, newsletters, newspaper advertisements, letters and/or web site.

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Telephone: (H) _____ (W) _____ Fax: _____

I understand The ACW is a registered charitable organization and I agree that I will receive no financial benefit or other consideration of value for my consent which I hereby voluntarily give and have the full right to give.

Print Name

Date

Signature

ACW REPRESENTATIVE

Parameters of Support for Assistance from the ACW

Projected Net Revenue Donated to ACW	Provide Assistance and Feedback	Issue Charitable Tax Receipts	Provide Letters of Support	Assist with Promotions	Assistance with Recruiting Volunteers	An ACW representative present to accept a cheque at your event
< \$2,500	Yes	Yes, subject to CRA receipting guidelines	Yes	No	No	Yes, Subject to availability
\$2,500 - \$5,000	Yes	Yes, subject to CRA receipting guidelines	Yes	In newsletter (subject to time), on local Facebook site	Yes, a few volunteers	Yes, subject to availability
> \$5,000	Yes	Yes, subject to CRA receipting guidelines	Yes	Same as above plus posting on online community calendar; > \$7,500, possible use of our web site for registrations and/or fundraising pages	Yes, some volunteers	Yes, subject to availability

Parameters of Support for Assistance from the AIDS Committee of Windsor (ACW)

The ACW cannot, under any circumstances, provide the following:

- Reimbursement for event expenses or any financial assistance
- Donor, client or volunteer personal information for mailings, solicitation or other
- Application for gaming licenses
- Special occasion permits (LCBO, venue/park permits, etc.)
- Selling tickets or accepting registrations on your behalf
- Finding sponsors, donors, prizes, auction items or awards
- Any promotion or advertising of the event such as writing or issuing media releases on your behalf, requesting media to be present at your event, booking advertising space and distributing flyers. Exceptions include promotions in our local e-newsletter (subject to timing), our local Facebook site and our online community calendar
- Administrative services (faxing, mailings, etc.)
- Guaranteed attendance of staff or volunteers at the event.

You must request permission for the following items:

- Use of the ACW brand logo
 - Requests to local organizations for sponsorships of \$500 or more
 - Requests for media sponsorship at your event, using the ACW name to solicit and secure this sponsorship.
-



The AIDS Committee of Windsor (ACW)

Supporter Lead Event Application Form

Personal Information:

First Name: _____ Last Name: _____

Address: _____ City: _____

Province: _____ Postal Code: _____

Daytime phone: _____ Evening Phone: _____

Email address: _____

Why have you decided to raise funds for The ACW?

Do you have a previous relationship with the ACW? If yes, please explain.

Event Information:

What is the name of your proposed event? _____

Please provide a brief description of the event you are proposing and how the funds will be raised:

When would you like to host this event?

Date: _____ Time: _____

Have you established a committee? Yes ____ No ____

What is the projected attendance? _____

What are some proposed venues?

What is the projected net revenue of this event?

a. \$500 - \$2,500 ____

b. \$2,500 - \$5,000 ____

c. > \$5,000 ____

How much of the above named net revenue will the ACW receive?

a. 100% (skip to question 8) ____

b. 50 - 99% ____

c. < 50% ____

Will another organization be receiving some of the profits? Yes ____ No ____

If yes, please list organization(s) here: _____

Does this event require sponsorship to be financially successful? Yes ____ No ____

Does this event involve ticket sales? Yes ____ No ____

If yes, what is the approximate price range of the tickets?

a. \$5 - \$15 ____

b. \$15 - \$25 ____

c. \$25 - \$40 ____

d. \$40 - \$60 ____

e. \$60 - \$80 ____

f. < \$80 ____

If your event is a ticket-sale oriented one, what value do guests receive in return for their ticket price?

What is the age group of the target market (check all applicable)?

- a. 0 - 12 _____
- b. 13 - 18 _____
- c. 19 - 25 _____
- d. 25 - 40 _____
- e. 40 - 55 _____
- f. 55+ _____

Will this event require the solicitation of door prizes, raffle prizes, silent auction items, in-kind donations or vendor participation? Yes _____ No _____

If yes, please specify:

What methods will be used to advertise this event (circle all applicable)?

- a. Media
- b. Word of mouth
- c. Flyers/Posters
- d. Partnering with a third party participant and using their networking abilities
- e. Mailers
- f. Web/Social Networking
- g. Other (please specify): _____

Could weather be a factor to the success of this event? Yes _____ No _____

Approximately how many volunteers would be required on event day? _____

Is a gaming license required for any aspects of this event? Yes _____ No _____

Is a permit of any kind required for this event? Yes _____ No _____

Will this event require tax receipts to be issued? Yes ____ No ____

Are there any other events in the area that are similar to this one and if so, what organization is hosting them?

Please provide any other pertinent information here or attach to your application form:

Proposed Budget: All costs to come out of event proceeds are to be paid directly by the event organizer. Please list all revenue and expenses and indicate if you expect them to be donated.

Revenue

Sponsorship \$ _____
 Registration Fees \$ _____
 Ticket Sales \$ _____
 Donations \$ _____
 Silent Auction/Raffle \$ _____
 Other (please specify):
 \$ _____
 \$ _____

Total Revenue: \$ _____

Expenses

Location \$ _____
 Food/Beverage \$ _____
 Printing \$ _____
 Advertising \$ _____
 License Fees \$ _____
 Other (please specify):
 _____ \$ _____
 _____ \$ _____

Total Expenses: \$ _____

Total Net Revenue: \$ _____

Please Note:

***Please allow up to one month for your event to be approved. Once your event is approved, it is very important that your donation be submitted to the ACW within 30 days of the completion of your event. Please be advised that by naming the ACW as the benefactor of your event, you are required to donate the amount you specified. The ACW is not responsible for any financial losses or liabilities resulting in this event. Thank you for your understanding.

Contact Information and Application Submission:

Mail: The AIDS Committee of Windsor
Attn: Michael Brennan, Executive Director
511 Pelissier St.
Windsor, ON N9A 4L2

Email: mbrennan@aids Windsor.org
Attn: Michael Brennan, Executive Director

Inquiries: Should you have any inquiries about any related items within this package, please contact Michael Brennan, Executive Director at 519-973-0222 ext. 110 or by email: mbrennan@aids Windsor.org.

Thank you for your interest in supporting the AIDS Committee of Windsor vision of HIV support and improving the lives for all people living with, at risk or affected by HIV!

Acknowledgement and Assumption of Risk

I am aware of the dangers and the risks to my person and property involved while participating in _____ event associated with the AIDS Committee of Windsor (ACW) through fundraising activities and/or programs and services activities. I understand that this activity involves certain risks for physical injury. I understand that equipment, if any, which may be provided for my protection may be inadequate to prevent serious injury. I also understand that there are potential risks of which I may not be presently aware.

Nevertheless, **I voluntarily elect to participate in this activity with knowledge of the danger involved, and I hereby agree to accept and assume any and all risks of property damage, personal injury, or death.**

The ACW does not insure participants in the above described activity, and participants who want to be covered must obtain their own insurance. The ACW asserts lack of responsibility or liability for injury resulting from this activity.

Waiver of Liability and Indemnification

In consideration for being allowed to voluntarily participate in the above referenced activity and/or event, on behalf of myself, my personal representatives, heirs, next of kin, successors and assigns, I forever

- a. **waive, release, and discharge the ACW** and its agencies, officers, sponsors, funders, community partners and employees from any and all negligence and liability for my death, disability, personal injury, property damages, property theft or claims of any nature which may hereafter accrue to me, and my estate as a direct or indirect result of my participation in the above referenced activity or event; and
- b. **Indemnify, save, and hold harmless the ACW** and its agencies, officers, sponsors, funders, community partners and employees of. From and against any and all claims of any nature including all costs, expenses, and fees arising out of or resulting from any actions during this activity or event.

I hereby consent to receive emergency, medical treatment which may be deemed advisable in the event of injury, accident or illness during this event activity or event. This release, indemnification and waiver shall be construed broadly to provide a release, indemnification and waiver to the maximum extent permissible under applicable law.

I, the undersigned participant, affirm that I am 18 years of age and am freely signing this Agreement, **I have read this form and fully understand that by signing this form I am giving up legal rights** and/or remedies which may otherwise be available to me regarding any losses I may sustain as a result of my participation. I agree that if any portion is held invalid, the remainder will continue in full legal force and effect.

READ BEFORE SIGNING

Name: _____

Signature: _____ Date: _____

(to be retained by originating department)

Participation, Waiver, and Release of Liability Form Acknowledgement and Assumption of Risk

Certification of Parent or Guardian (for any participant under the age of 18. As parent or guardian of the applicant, I certify and confirm acceptance of the Participant's Waiver and Release of Liability Form Acknowledgement and Assumption of Risk on behalf of the applicant. I certify that the information on this form is true and I am aware of the applicant's intention to participate in the event(s) identified and that he/she does so with my approval and consent. Further, I accept the risk of all conditions as stated in Participation, Waiver, and Release of Liability Form, Acknowledgement and Assumption of Risk.

READ BEFORE SIGNING

Name of Participant: _____

Name of Parent/Guardian: _____

Signature of Parent/Guardian: _____ Date: _____

(to be retained by originating department)
