



Association for Workplace Tragedy Family Support

Guidelines for Third Party Fundraising Events

Overview and Guidelines

We greatly appreciate your interest in organizing a fundraising event in support of the Association for Workplace Tragedy Family Support, known as Threads of Life. Threads of Life defines third party fundraising as “an external fundraising activity run by outside supporters whose proceeds are directed to Threads of Life”.

Threads of Life is a registered Canadian Charity (Registered CRA charity #87524 8908 RR0001). Established in 2003, Threads of Life has worked to advance its mission of helping families heal through a community of support and promote the elimination of life altering workplace injuries, illnesses and death.

Please review our guidelines before planning your event.

Approval Process

Threads of Life and the Event Organizer(s) will ensure that fundraising events do not proceed without the prior approval of the Third Party Event Proposal Form (see attached), any contractual agreement required by Threads of Life and execution by the Event organizer(s). Agreements between Threads of Life and the Event Organizer will reflect the requirements and principles in this Guideline.

Liability and Accountability

The Event Organizer(s) will adhere to the following:

- Provide a record of revenues and expenses, and copies of receipts to Threads of Life
- Provide periodic status updates to Threads of Life on an agreed upon basis
- Threads of Life will not be responsible for any financial losses or unsettled accounts of the Event Organizer or fundraising event.
- Threads of Life will be advised if the event is to benefit other charitable organizations, who they are, and what percentage of the final net revenue they will receive.
- Threads of Life will be provided with reasonable prior notice of any Third Party Event cancellation.
- The Event Organizer will not enter into any oral or written agreements on behalf of or in the name of Threads of Life.
- All contracts must be submitted to Threads of Life for review and approval by prior to signing.

Fundraising Practices

Volunteers who solicit or receive funds on behalf of Threads of Life adhere to Imagine Canada's *Ethical Fundraising and Financial Accountability Code* and other applicable codes of ethics and standards of practice;

- act with fairness, integrity and in accordance with all applicable laws;
- discontinue solicitation of a prospective donor who identifies the solicitation as harassment or undue pressure, or does not wish to be solicited;
- immediately disclose to Threads of Life any apparent or actual conflict of interest/loyalty;
- and do not accept donations for purposes that are inconsistent with Threads of Life's mission.

Financing

- In accordance to Threads of Life's legal obligations to comply with CRA guidelines, Threads of Life will not underwrite any Third Party event.

Insurance

- Threads of Life will not provide insurance coverage for any Third Party events.
- Threads of Life will not assume any legal or financial responsibility relating to the fundraising event or Event Organizer.
- Event organizer must provide proof of insurance, if requested
- Threads of Life is not responsible for any damage, theft or accidents to individuals or property.

License and Fees

- Any Third Party events involving licenses and fees will comply with all government regulations and applicable laws. Threads of Life must be given adequate time to review all applications. The Event Organizer(s) are responsible for payment of applicable licensing and/or permits and costs.

Event Promotion and Solicitation

- Threads of Life will have the final, signed approval on ALL promotional materials including brochures, posters, flyers, advertisements, publicity and/or media communications relating to participation in the fundraising event.
- The Event Organizer(s) is responsible for making all media contacts and must ensure that it is clear that Threads of Life is not the organization requesting media coverage and/or participation.
- Threads of Life, will at its discretion and depending on supplies and reasonable requirements, provide materials such as brochures, etc.
- Threads of Life will not provide any donor contact lists
- All sponsorship/donation lists must be reviewed and approved by Threads of Life.

Use of the Threads of Life Name and Logo

- Threads of Life will, in its discretion and upon prior written approval, allow the use of its name and logo by the Event Organizer(s) to promote the event.
- Any use of the logo must be approved, in writing, prior to its use.
- Threads of Life reserves the right to withdraw the use of its name at any time and will not assume any liability or costs in doing so.

Tax Receipts

- Threads of Life will issue tax receipts in accordance with CRA regulations
- Receipts cannot be issued by Threads of Life for proceeds of an event; receipts are issued only for direct donations where the donor receives no benefit for the contribution
- Documentation to support tax receipting for donations must be provided to Threads of Life within 30 days of the event
- Event Organizer(s) must provide a complete and legible list of donors to Threads of Life which includes:
 - First and last name
 - Address, including city and postal code
 - Amount given
 - Amount tax receipt to be issued for
 - List and value of any benefits received for donation
 - Any other information reasonably required by Threads of Life
- Threads of Life will issue tax receipts to individual donors and business acknowledgement letters to organizations that make donations to the event
- Tax receipts will only be issued by Threads of Life for cash donations of \$20.00 or greater
- Sales of raffle tickets, admission tickets, green fees, auction items and other goods that provide a benefit to donors are not eligible for a tax receipt from Threads of Life, except when an admission fee exceeds the Fair Market Value (FMV) of the benefits received.
- A tax receipt may be available for a portion of the admission price if a ticket or entrance fee exceeds the Fair Market Value (FMV) of the benefits received. This must be discussed and approved by Threads of Life well in advance of the event date.
- A tax receipt cannot be issued for services by Threads of Life including personal, professional or legal services
- Threads of Life will issue a business acknowledgement letter to event sponsors.
- A gift of property other than cash is referred to as a "gift-in-kind." Threads of Life will issue a gift-in-kind charitable donation receipt to individuals and a business acknowledgement letter to businesses provided that the Event Organizer(s) supplies adequate documentation to verify the Fair Market Value of the item(s) donated. At the discretion of Threads of Life, items of little value will not qualify as a gift-in-kind.
- Fair Market Value will be established by providing Threads of Life with:
 - A purchase invoice or other proof of purchase of the item
 - An independent third party appraisal and value of the item. All costs of appraisal are borne by the Event Organizer(s)
 - A current price list for the items at a recognized commercial enterprise operating independently of the donor

- Individuals who request charitable tax receipts for gifts-in-kind will also have to complete the CRA three year holding declaration.
- The total amount of receiptable donations that Threads of Life is able to receipt cannot exceed the net proceeds from the event.

Sponsorship

- Threads of Life will have final, signed approval of event sponsors.
- Threads of Life will not solicit sponsors on behalf of the Event Organizer(s), nor will it provide contacts for sponsorship.
- Any third party contacting potential sponsors must disclose the nature of the third party arrangement and must position Threads of Life as a recipient of the event proceeds, not the host or sponsor of the event.

Staffing

- The Event Organizer(s) will provide all staffing for the event unless otherwise agreed in a contract with Threads of Life.
- Threads of Life will not guarantee staff or volunteer representatives to attend or participate in the event.

Privacy

- All information obtained and used by Threads of Life will be treated with the utmost confidentiality and security in accordance with Threads of Life policies.

*Thank you for raising funds for Threads of Life!
Your dedication, passion and commitment to workplace safety is greatly appreciated!*

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THIRD PARTY EVENT PROPOSAL FORM

EVENT DESCRIPTION

Event Name: _____

Type of Activity: _____

Event date(s): _____ Location: _____

Brief description of the event:

CONTACT INFORMATION

Organizer(s) Name: _____ Business / Group Name: _____

Mailing Address:

Phone Number: _____ Fax Number: _____

Email Address: _____ Website: _____

THREADS OF LIFE INVOLVEMENT

What type of involvement do you want from Threads of Life?

Are there any other organizations affiliated with or receiving proceeds from this event?

I (we), _____ have read and understand the guidelines provided to me by Threads of Life.

Signature of Organizer

Date (MM/DD/YYYY)

Signature of Threads of Life
Regional Development Coordinator

Date (MM/DD/YYYY)