



THIRD-PARTY FUNDRAISING

Overview

First United Church Community Ministry Society (henceforth referred to as First United) recognizes that third-party events help to promote greater awareness of our mission and broaden our base of donors and partnerships. While First United encourages third-party fundraising events, the Director of Development must approve all events in advance. This is an important safeguard in preserving the integrity of the people we serve, and the donors who generously support us. Event organizers must agree in writing to abide by the policies and procedures described below.

First United defines third-party fundraising as “a project undertaken by an individual, affiliated group or organization, for the purpose of raising money on behalf of First United.” This policy covers any project that:

- Requires the use of First United’s resources, including staff time, rooms, equipment; and/or
- Requires First United to issue official receipts under its charitable tax number.

Our Practice

1.0 APPROVAL

- 1.1 First United may approve fundraising ventures which it deems suitable to fulfill its mission, goals, and objectives, and which will not result in compromising First United’s public image. To secure First United’s endorsement, individuals or groups who wish to initiate a third-party fundraising project for or on behalf of First United must present their fundraising plan to the Director of Development at least 90 days prior to the event during the event planning phase. The plan should describe the scope of the event, the proposed percentage of the share of the net proceeds to be donated to First United, and should include any requests for use of First United resources, including volunteer and staff involvement. First United will provide an event plan template for organizers.
- 1.2 First United cannot provide staffing or volunteer resources for third-party fundraising events such as: soliciting donations, handling mailings, attending committee meetings, recruiting attendees or collecting monies unless approved by the Director of Development.
- 1.3 First United is not responsible for the costs of fundraising or for any shortfalls that may be incurred in third-party fundraising ventures.

2.0 PUBLICITY

- 2.1 Events may not incorporate the name, First United Church Community Ministry Society, but may use a second line identifying the relationship with First United, such as “XYZ Association Swimathon, benefiting First United.”



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- 2.2 Event organizers will establish a public relations plan for their event. Advertising and promotion of the event is the sole responsibility of the third-party organizer. First United will review and approve all copy (i.e. brochures, advertisement, etc.) before printing. If First United's logo is to be used in publicity, the layout and design incorporating the logo must follow our style guide and be approved prior to printing. The full name of First United is "First United Church Community Ministry Society" and First United should be identified by its full name in all materials pertaining to the event.

3.0 DESIGNATION OF DONATION

- 3.1 The Director of Development on behalf of First United, will discuss program designation options with event organizers. Alternatively, a group may mark the proceeds as undesignated, in which case First United will use the proceeds to meet needs identified by First United. A written statement describing the intended use of the funds should accompany the event proceeds when they are turned over to First United.

4.0 OBLIGATIONS AND CONTRACTS

- 4.1 Only the Executive Director of First United can enter into any contract on behalf of First United or obligate First United to pay for any service or item connected with the event.

5.0 CONDUCT AND DECORUM

- 5.1 All third-party fundraising events shall be conducted in a manner that is appropriate to the mission and vision of First United. No offensive or unlawful conduct shall be associated with any third-party event. First United reserves the right to withdraw from its endorsement of any event deemed offensive. First United also reserves the right to decline fundraising proceeds from third-party events deemed offensive.

6.0 SOLICITATION OF CORPORATE DONATIONS

- 6.1 First United must be made aware of all solicitations of corporate gifts before the company is approached. This vetting is intended to avoid unnecessary duplication of efforts and excessive requests to any one potential donor.

7.0 EXPENSE AND REVENUE REPORT

- 7.1 Within 60 days of the event, the organizing committee must submit a statement of revenue and expenses. The organization should strive to have at least two-thirds of the funds raised in connection with the event be net proceeds. The proceeds from the event should be turned over to First United within 60 days.

8.0 TAX DEDUCTIBILITY



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8.1 Ticket prices for events are normally not fully tax creditable. First United can determine what amount is tax creditable with the help of the organizing committee following the event. The phrase “a tax receipt will be issued for a portion of the ticket price” may be used on the tickets and advertisements if discussed with First United in the event planning phase.

9.0 GAMING ACTIVITIES AND LEGALLY CONTROLLED DRUGS

*** First United does not condone acceptance of proceeds from legally controlled drugs – alcohol and cannabis in particular.**

9.1 First United does not condone acceptance of the proceeds of gambling.

10.0 USE OF FIRST UNITED MAILING LIST

10.1 First United does not provide its mailing list to other organizations or individuals for fundraising purposes. Event organizers should have their own lists of potential contributors or participants. If the target audience for the event is deemed to be the same as First United’s constituency, and a mail out to First United’s list is required, this must be requested at the approval stage. Any cost associated with the mail out will be the responsibility of the event organizer.

11.0 LIABILITY INSURANCE

11.1 Each event must have in place general liability and property insurance. This is available through First United’s carrier at no additional cost to First United.

12.0 INDEMNITY

12.1 Each event organizer agrees to indemnify and hold harmless, First United, its affiliates, officers, employees, agents, representatives, contractors, and licensees from and against all claims, losses, damages, liabilities, and expenses, including reasonable attorney’s fees arising out of or occasioned by any act or omission of the third-party event organizer, its officers, partners, employees, agents, contractors, licensees, guests, invitees, or attendees, in connection with the third-party event.

13.0 POST EVENT EVALUATION

13.1 The organizers of each event will agree as a condition to conducting the event, to a general review with First United following the event. The review shall include all aspects of the event, including the anticipated vs. actual results, effectiveness of the event, feasibility/desirability of repeating the event, any special opportunities or problems identified, as well as an analysis of the overall event. Event evaluation forms will be made available to organizers.



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Related Documents

- Receipting Policy
- Fund Development Policy
- Donations
- Planned Giving Policy

Are you ready to organize a third-party fundraiser for First United?! Contact Lesley Anderson, Director of Resource Development, to learn more and get started: ladnerson@firstunited.ca and 604-681-8365 ext. 119.