

## **Third Party Fundraiser Policy**

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**Purpose:** To serve as a framework for CMHA's individuals and groups involved in third party/arms length fundraising to support CMHA nationwide.

**Scope:** This policy applies to all CMHA affiliates who would like to support CMHA through events that are not run by CMHA staff and choose to use CMHA National's online Third Party Fundraising tools or similar online tools used by some CMHAs.

**Important Definitions:** There are three types of third party fundraising:

**Individual:** The first type is a fundraising event where net proceeds benefit the CMHA, which is organized and executed by an individual or group of supporters who are not affiliated with CMHA National or with a CMHA affiliate.

**Group:** The second type of fundraising event is an effort by a group, such as a school, business or community organization to raise funds for the CMHA.

**Affiliate:** A fundraising effort by a CMHA affiliate(s) for the benefit of its own programs and services using the CMHA's online donations system.

Third-party events are **not** run by CMHA staff; however, limited support may be given by the CMHA's National Director of Fund Development or by relevant CMHA affiliates.

### **Third Party Events are required to:**

- Be consistent with the mission and values of the CMHA.
- Maintain a positive presentation and give the CMHA positive exposure and increased public awareness
- Provide an overall financial net gain to the CMHA operations or programs.
- Provide positive marketing/public relations exposure. •Meet staff and volunteer resource requirements.

**The CMHA reserves the right to:**

- Refuse involvement, and the use of its name and logo, in any event that does not meet with its expressed approval.
- Relinquish support of any third party event that does not abide by the policies, criteria, and guidelines set out in this agreement, without any liability or obligation.

**Approved Third Party Events:** The Third Party Event Organizer(s) and the CMHA are required to adhere to the following guidelines:

a.) The CMHA Brand - It is important for the CMHA to uphold brand integrity and consistency in dealing with the public. The use of CMHA “Proud Supporter” logo is permitted for Third Party fundraisers. The use of the CMHA name is permitted only with CMHA approval.

b.) Promotional Materials: The CMHA will have final, signed approval on ALL promotional materials (e.g., brochures, flyers, advertisements, public and media communications).

**NOTE:** *CMHA must review and approve all promotional materials (including, but not limited to, letters, brochures, press releases, flyers, and advertising) prior to distribution. The CMHA name is not permitted on any product packaging and all promotional materials must clearly state the percentage of proceeds or portion of ticket price that will be donated to CMHA.*

**Donations and Sponsorships:** Applications will provide a list of sponsors who will be asked for support, including a description of their donation and/or sponsorship, plus its retail value as well as contact information. This information will allow the CMHA to better recognize partners within the community.

- The CMHA will have the final approval of the solicitation of all sponsors.
- The CMHA will not solicit sponsors on behalf of Third Party Event Organizer(s), nor will they provide contacts for sponsorships. Gaming (including Raffles, 50/50 Sales and Licenses)

Third party events involving licenses and fees will conform to government regulations (federal, provincial and municipal) including requirements by the licensing body on the distribution and use of funds. It is the sole responsibility of the Third Party Event Organizer(s) to fill out and submit all such applications.

A minimum of 10 business days must be given to the CMHA to review such licenses.

Third Party Event Organizer(s) will pay the fees for said licenses and are responsible for filing post event forms/reports.

**Financing and Insurance:** Only the final net proceeds will be processed by CMHA. Under no circumstances will Third Party revenues and expenses flow through the CMHA. The CMHA will not underwrite any Third Party event and the CMHA insurance will not cover Third Party events.

**Tax Receipts and Gift Acknowledgements :**

The CMHA National may provide receipts for income tax purposes, for qualified gifts, through the online donation system. Donations submitted, outside of the online donation system (e.g. cheques) of \$20 or more will receive a tax receipt. Beneficiary affiliates may provide receipts for income tax purposes, for qualified designated submitted to them. The CMHA reserves the right to issue or not issue any receipts at its sole discretion, in accordance to Canadian Revenue Agency rules and regulations. CMHA adheres to all relevant privacy laws. Donor information between CMHA National and CMHA affiliates is shared within the context of these laws.

**Gifts-In-Kind:** CMHA does not issue tax receipts for Gifts-In-Kind to Third Party events. Gifts-In-Kind are gifts of property, rather than cash and marketable securities. These include (but are not limited to) gifts of supplies, equipment, books and artwork. Gifts-In-Kind not eligible for tax receipts include a gift of professional/personal services from an individual, a gift by a company for its principal product or service, and donations of used clothes or furniture etc.

**Exemptions to Policy:**

- Programs that raise money on commission;
- Events that encourage/involve behaviour that is counter to the CMHA mission and/or programmatic activities;
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity;
- Direct solicitation (including, but not limited to, door-to-door canvassing, telemarketing or broad-based internet broadcasting)

## **Responsibilities:**

Third Party Event Organizer(s) will:

- Keep a record of revenues and expenses for submission to the CMHA if requested.
- Provide periodic status reports to the CMHA on an agreed-upon basis.
- Provide reasonable notice of any third party event cancellation.
- Inform the CMHA if the third party event is to benefit other charity partners.
- Be responsible for any financial losses or unsettled accounts.

## **Third Party Event Organizer(s) will not:**

Name the CMHA in, or sign contracts on behalf of Third Party Event Organizer(s) without the CMHA's written consent.

CMHA National will provide the following through the Artez program::

- Use of the online software to promote the event and receive donations. Any donation received through the online Artez giving program and designated to a particular Branch, Region or Division will be subject to an administration charge to CMHA National of 10% of the value of the gift to allow for processing, software maintenance and record-keeping. Online giving will be reconciled and distributed on an annual basis by CMHA National.
- Limited webpage technical support in creating a webpage for the event; event organizers are expected to administer their own online event page (e.g. post information, send email requests)
- Volunteer thank you letters
- Receipting to donors
- Donation processing and distribution
- A review of applications for consistency with CMHA mission
- A review of potential sponsors
- A review of gaming licenses
- Promotional materials (limited to CMHA electronic fact sheets and corporate brochures)

CMHA National will provide the opportunity for individuals and groups to easily designate funds to the affiliate of their choice on the Event Request Application Form located on the CMHA website. Designation of funds for specific projects and/or services will be left to the discretion of the CMHA affiliate based on need and highest priorities CMHA Affiliate. CMHA affiliates should discuss the potential Third Party event with the National Director of Fund Development so that information-sharing and lessons learned can inform best practices around Third Party fundraising nationwide.