



WCSS Third-Party Fundraising Agreement

What is a 'third party' event?

An event organized by a volunteer, community group, or company that is not an official Whistler Community Services Society (WCSS) activity is a 'third-party' event. Acting independently and with WCSS's approval, third-party events are an important resource for raising funds to help us provide programs and services in Whistler. When you organize a third-party event, you are not only raising money to support WCSS – you are also raising awareness about WCSS and the important work we do, so thank you in advance. We ask that all events supporting WCSS be compatible with our mission, vision, and values.

Fundraising Terms and Conditions:

For WCSS to endorse events held on its behalf, organizers need to agree to the following terms and conditions:

- Prior approval to hold a third-party event is required. Approval is based on the event's type, theme, and financial viability. WCSS reserves the right to withhold the use of its name from any event it feels is inappropriate.
- The event must be self-sufficient in relation to workforce requirements. WCSS staff or volunteers MAY be able to be involved; however, our workforce priority is delivering services to the community.
- Complete and submit the Event Proposal Form at least 10 business days before your event.
- WCSS must approve all promotional/advertising copy featuring the WCSS name and logo.
- Taking commission for any purpose on funds raised as part of a third-party event is prohibited.
- WCSS assumes no legal or financial liability associated with the event.
- WCSS requires that event organizers use satisfactory financial controls, and funds raised must be sent to WCSS within two weeks of the event date via cheque or electronic transfer to the attention of the WCSS finance manager

Tax Receipt Guidelines for Fundraising Events:

The following guidelines will assist in your event planning by outlining tax receipt guidelines:

- WCSS issues tax receipts following Canada Revenue Agency (CRA) requirements. It is important that you refer to the CRA's website (<http://www.cra-arc.gc.ca/charitiesandgiving>) for further information.
- WCSS can only issue tax receipts to the true donor. As a fundraiser, you are collecting donations from the true donors (your event participants). This means that we cannot issue you, the fundraiser, with a tax receipt, but under certain circumstances, we can issue tax receipts to your donors/participants.

Before you request that WCSS issue your donors/participants tax receipts, you should assess whether you comply with the tax receipting requirements. Your donors/participants may be happy to contribute to your fundraiser without expecting to receive a tax receipt, and by not having to comply with the tax receipting requirements, your event may be easier to administer.





The individual donors/participants to your event can be issued a tax receipt under the following circumstances:

- Donations are over \$25.
- Donations are made by cash or cheque (for in-kind donations, please get in touch with the Financial Controller).
- Cheques must be written to Whistler Community Services Society.
- You have received approval from WCSS prior to holding the event (refer to the Fundraising Agreement).
- WCSS requires a donor list detailing the individuals that require a tax receipt (please request a donor list template from WCSS before the event to ensure all required data is collected from the true donor(s)).
 - The donor list must be complete and legible and contain each donor's name, email, phone number, and mailing address (if tax receipts are to be issued).
 - The total amount of funds that WCSS receives must be equal to or more than the total per donor list.
- The fair value of any benefits donors/participants receive by donating is provided to WCSS. These benefits include meals, door prizes, merchandise, concerts, and shows. The fair value must be supported by comparison to similar regularly priced items. This fair value will be deducted from the total amount donated as receipts cannot be issued for services received, only for funds received that are NOT in exchange for goods or services. *E.g. for a golf tournament, the cost of entry is \$200 and includes a round of golf and lunch for a value of \$150. A tax receipt could be issued for a \$50 value, the true donation paid.*
- Any benefits donors/participants receive cannot exceed 80% of the donation amount.
- Donors/participants do not receive lottery or raffle tickets.
- Donors/participants are not paying for registration fees for a sporting event.
- Donors/participants are not providing sponsorship for the event.

Please contact the WCSS Financial Controller 604-932-0113, finance@mywcss.org if you have any questions.





AGREEMENT

Thank you for your interest in donating to Whistler Community Services Society. Please send us the completed Third Party Event Information form so we can endorse your event and approve the use of our name and logo. A WCSS staff member will contact you once the proposal is received, and a decision will be made within three business days of form submission.

Please send completed Third Party Event Information form to Tom Chatwood, Community Development and Third-Party Fundraising Coordinator for WCSS | thomas@mywcss.org

Third-Party Event Information

Event Name:

Today's Date:

Main Contact Name:

Mailing Address:

Email Address:

Phone Number:

Please select the category that best describes you:

- | | | |
|--|--|---|
| <input type="checkbox"/> Individual | <input type="checkbox"/> Retail Store | <input type="checkbox"/> Restaurant/Pub |
| <input type="checkbox"/> Grocery Store | <input type="checkbox"/> Activity Provider | <input type="checkbox"/> Accommodation Provider |
| <input type="checkbox"/> Service Provider | <input type="checkbox"/> School | |
| <input type="checkbox"/> Other, please describe: _____ | | |

Location:

Event date(s) and time(s):

Estimated donation to WCSS:

- I agree to submit donation within two weeks of the event date.
- I understand and agree to send all publicity material to WCSS for approval prior to printing/distribution.
- I understand and agree to WCSS' Fundraising Guidelines.

Do you require a Donor List Template from WCSS? **YES / NO**

Print Name

Signature

Date

WCSS OFFICE USE ONLY:

Fundraising Proposal: # _____

Date Received: _____

Fundraiser Approved: YES / NO

WCSS Staff Approved: _____

Special Notes: