



**Okanagan
Boys & Girls Clubs**
A good place to be

Third Party Fundraising Guide

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Together we help give children, youth and families a safe place to belong

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Third Party Fundraising Guide

Why support the Okanagan Boys and Girls Clubs?

Okanagan Boys and Girls Clubs have a vision to help children and youth discover and achieve their dreams and grow to be healthy, successful and active participants in society.

Our mission is to provide a safe, supportive place where children and youth can experience new opportunities, overcome barriers, build positive relationships and develop confident and skills for life.

Thanks to supporters like you, Okanagan Boys and Girls Clubs is seen as the leader in the field offering high quality programs to meet our vision. By deciding to organize a fundraising event, you have chosen to make a difference and to help change lives.

Where will your money go?

A gift to the Okanagan Boys and Girls Clubs goes toward programs, service, supplies, equipment, transportation and facilities to ensure we can provide the highest quality opportunities for young people and their families.

Some of our funds available for designation include:

- ☑ General - Area of Greatest Need
- ☑ Participant Sponsorship
- ☑ Food Security
- ☑ Emergency Shelter
- ☑ General Education
- ☑ Program Supplies and Equipment
- ☑ Vehicles and costs associated with Transportation
- ☑ Facility Upgrades

Third Party Fundraising Guide

Step-by-step guide

1. Contact Us

The staff at Okanagan Boys and Girls Clubs are here to help! Let us know that you're planning on hosting a fundraiser by filling out our Third Party Fundraising (TPF) Request form and don't hesitate to ask any questions that come up along the way. We can help provide ideas, information and support for your event.

2. Event Ideas

There's no lack of options when it comes to fundraising events. Here are a few ideas to get you started but you can really turn anything into a fundraiser with a little creativity.

- ☑ Bottle Drive
- ☑ Car Wash
- ☑ Lemonade Stand
- ☑ Craft Sale
- ☑ Pancake Breakfast
- ☑ Mini-golf Tournament
- ☑ Jeans Day
- ☑ Pizza Lunch
- ☑ Sports Party (Super Bowl, Stanley Cup Playoffs)

3. Fundraising Opportunities

So you've picked an event, now how do you raise money? Here are a few ways you can generate revenue.

- ☑ Ticket Sales
- ☑ Live or Silent Auction
- ☑ Percent of Food and Beverage Sales
- ☑ Pledges
- ☑ Sponsorship

4. Get Organized

Organizing a successful fundraising event takes a lot of hard work and planning. Depending on the size of your event, you may want to consider rounding up a few skilled and enthusiastic volunteers to form an organizing committee. This way you can split up the responsibilities and collaborate to manage everything efficiently.

5. Set the Date & Venue

You have the 'what' – now it's time to pick the 'when' and 'where'. Check local event calendars to ensure you pick a date that doesn't compete with existing community activities to get the best turnout possible.

Things to consider when selecting a venue are rental costs, included amenities like tables & chairs, kitchen or catering facilities, accessibility, capacity and licensing or insurance requirements. And if you're thinking outdoors, don't forget to come up with a plan B in case of bad weather!

6. Set your Fundraising Goal & Budget

Set a fundraising goal for your event and plan how you expect to reach it. Create a budget to manage your expenses and estimate your revenues. Setting an itemized budget helps you ensure you've set a realistic target and keep your expenses on track.

7. Licenses

Depending on your event and its fundraising activities, some licenses may be required. To confirm, check with the City, Police, Liquor Control & Licensing Branch and Gaming Policy & Enforcement Branch.

Gaming Activities:

- ☑ Any gaming activities (e.g. ticket raffles, poker, bingo, casinos, etc.) require a license
- ☑ All gaming funds raised by a community fundraising group must be donated to an eligible organization. Each application from a community fundraising group (i.e. you) must have an accompanying letter from the eligible recipient organization (i.e. OKANAGAN BOYS AND GIRLS CLUBS) that acknowledges the event, agrees to accept the proceeds and agrees to use them for eligible purposes.
- ☑ Community fundraising groups may only apply for a Class B ticket raffle only (gross revenue of \$20,000 or less).
- ☑ All gaming funds must be identified as such in your reporting back to Okanagan Boys and Girls Clubs.
- ☑ For more information or to apply: <https://www.gaming.gov.bc.ca/licences/>

Special Occasion Liquor (SOL) License:

If you want to serve or sell liquor in a public space that is not licensed, you will need a Special Occasion License: <https://solo.bcldb.com/>

Other common licenses and permits required for events include Outdoor Event Permits for City of Kelowna properties, Temporary Food Service Permits from Interior Health, and SOCAN Licenses for publicly played music.

8. Soliciting Donation and Sponsorship

All solicitations must be reviewed but the Director or person appointed to work with the Third Party Fundraisers. A copy of the list including Company or Individual name, contact information and what is being solicited must be forwarded to the Resource Engagement Coordinator.

All solicitation letters must include the OBGC brand compliant logo to highlight the partnership between the Third Party Fundraiser and OBGC.

OBCG reserves the right to decline solicitation of gifts of funds or services deemed as not meeting vision, mission and core values of our organization or where we are aware that the Company or individual is already contributing in other ways within the organization.

9. Donations & Tax Receipts

Okanagan Boys and Girls Clubs is a registered charity and under the *Income Tax Act* can issue official donation receipts to donors for gifts. Only events that have submitted an TPF Application (Appendix A) in advance will be given tax receipting consideration as the Canada Revenue Agency (CRA) requires us to maintain control over the receipts that are issued and ensure that they are only issued to donors for the eligible amount of the gift. CRA conditions apply and for more information please visit <http://www.cra-arc.gc.ca/chrts-gvng/>.

Donation cheques should be made out to the Okanagan Boys and Girls Clubs. Cash can be collected and exchanged for a bank cheque made payable to Okanagan Boys and Girls Clubs. Please see the Financial Summary Spreadsheet (Appendix B) for the detailed donor information that must be provided if only one cheque is being submitted and tax receipts have been approved.

Tax Receipting Guidelines:

The Okanagan Boys and Girls Clubs is honoured to be your charity of choice. The next section outlines the CRA tax policies that apply to donation tax receipts. To ensure a successful event, please read these guidelines early in the planning process.

The planning and expenses associated with an Third Party Fundraising (TPF) are the responsibility of the event organizer. However, the staff of the Okanagan Boys and Girls Clubs is here to provide you with guidance, support, and resources.

Tax receipting must be in compliance with CRA regulations so TPF organizers wishing to request tax receipts from the Okanagan Boys and Girls Clubs for event participants must comply with certain requirements for record-keeping and financial accountability.

In accordance with CRA's regulations, when an TPF takes place that the Okanagan Boys and Girls Clubs was not aware of in advance, the Okanagan Boys and Girls Clubs must not issue tax receipts.

Tax Receipts:

Donors to your event are eligible for tax receipts if they donate directly to the Okanagan Boys and Girls Clubs (e.g. writing their cheques out to 'Okanagan Boys and Girls Clubs') – these donations will be attributed to your fundraiser since your event inspired the gift.

Event organizers must submit their list of donors and money within 30 days of their event to prevent delays in receipting donors. Donations of less than \$10 will not be receipted.

Please be sure to give consideration to how you will cover event expenses when planning your event as the total amount that Okanagan Boys and Girls Clubs receives following your event must be equal to or greater than the total amount of tax receipts to be issued. Event organizers cannot claim all event donations for themselves as others have donated to the cause as well.

Tax receipts can only be issued if a donation is made without a personal advantage being received. Summary Gift and Tax Receipting information is provided below however we do ask you to please visit the Canada Revenue Agency's website at www.cra-arc.gc.ca for greater detail.

Tax receipts cannot be issued for:

- purchasing raffle tickets
- purchasing auction items
- payment of registration fees
- purchasing merchandise
- payment of sponsorship fees to support a charity event in return for advertising and other benefits

In order to issue tax receipts to TPF donors, the Okanagan Boys and Girls Clubs requires the following information about the donors and donations:

- Listing of the gifts received and reconciled to the total dollar amount of the tax receipts to be issued.
- Completed a list of the full names and addresses of all donors requiring a receipt. A tax receipt can only be issued in the name of the true donor so please be sure to specify who the gift is actually from. For example, an individual, an employee group or the legal entity (a corporate gift).

Event Information Required for Gifts with Advantage:

In some events (like a golf tournament or fundraising dinner) the donor receives an advantage with their donation or registration fees. An advantage is the total value, at the time the gift is made, of all property, services, compensation, or other benefits that a person is entitled to receive in relation to the gift.

In all cases where a donor has received an advantage (green fees, dinner, prizes, etc.) the event will require a split receipting (advantage) calculation. Split receipting involves creating a breakdown of the fair market value of all advantages received and calculating the amount of each donation, amount of advantage per donation and amount eligible for receipt.

We must be able to account to CRA for the amount of the advantage received by the participants as a result of their participation in the fundraising event. In accordance with CRA regulations, Okanagan Boys and Girls Clubs is unable to issue receipts for any third party fundraising event where the donor receives an advantage for their donation if the above information has not been provided.

To ensure your donors are eligible for tax receipts, please contact the Okanagan Boys and Girls Clubs for guidance on split receipting calculations. We are here to help!

Gifts out of Inventory:

In some circumstances for products donated to an event Okanagan Boys and Girls Clubs may issue a gift-in-kind tax receipt to a business for the market value of a gift out of inventory. Gifts of services are not eligible for a gift-in-kind tax receipt.

To determine eligibility, please contact Okanagan Boys and Girls Clubs directly.

10. Recruit Volunteers

You may need a few extra hands for your event to make sure it goes off without a hitch. Figure out what jobs need to be done and start recruiting to fill those positions. Castanet, Kelowna Community Resources and local newspapers are great resources for volunteer recruitment.

11. Use of Okanagan Boys and Girls Clubs Name & Logo

Once you have completed your Third Party Fundraising Request and it has been approved, we would be pleased to send you our logo for use on your event materials. We have several file formats and colour options available so let us know if you need something in particular. Please do not stretch, remove elements, or alter the colours of our logo.

12. Promote your Event

You've done all of the hard work to plan your event – now it's time to get people there! Okanagan Boys and Girls Clubs can help spread the word by listing your event on our website, sending out an e-blast to all staff of OKANAGAN BOYS AND GIRLS CLUBS, and sharing it on our social media sites.

To spread the word you can distribute posters around town, create posts for online event listings, and share via social media. It also may be worth considering submitting a release or story to the local media outlets.

13. After the Event

Congratulations – you did it! Now it's time to count and submit the funds you raised to Okanagan Boys and Girls Clubs. Complete the necessary required forms and bring to the Okanagan Boys and Girls Clubs within 30 days of your event. And make sure to send along some photos and highlights from the day so we can share your success!

And don't forget to thank those who helped make your event a success. When their efforts are recognized they'll be more excited to help you at your next fundraising event.

Contact

Richelle Leckey

Resource Engagement Coordinator, Okanagan Boys and Girls Clubs

p. 250-762-3989 ext. 107

f. 250-762-6562

e. specialevents@boysandgirlsclubs.ca

Appendixes

Appendix A – Third Party Fundraising Agreement

☑ To be completed for all events prior to promoting the event

Appendix B – Financial Summary Spreadsheet

☑ To be completed for all events requesting tax receipts within 30 days of event

Thank you for your support!



Appendix A

Okanagan Boys & Girls Clubs

Third Party Fundraising Agreement

_____ (“the Organization”) agrees to hold a third party fundraiser (“fundraiser”) to benefit the Okanagan Boys & Girls Clubs (“The Society”) as outlined below:

WHEREAS the organization is desirous to organize and implement a third party fundraiser for The Society; and
WHEREAS The Society is desirous of securing the benefits resulting from a third party fundraiser;

NOW THEREFORE the covenants and agreements contained, the parties hereto agree as follows:

1. The Organization will make absolutely clear to the general public that:
 - a) The fundraiser has been initiated by the Organization with the support of other concerned citizens in support of Okanagan Boys and Girls Clubs work;
 - b) The Organization is raising funds to be donated to The Society.
2. The Organization will carry out the fundraiser in a manner that respects and adheres to the Vision, Mission and Core Values of the Okanagan Boys & Girls Clubs, which can be found on The Society's web site as www.boysandgirlsclubs.ca.
3. The Organization will comply with the financial terms set out Schedule A.
4. The Organization understands that the funds raised will be spent at the discretion of the Society in support of programs and services operated by The Society. The Organization cannot dictate types of specific assistance which may or may not be provided.
5. The following communication guidelines shall be in effect:
 - a) The Boys & Girls Clubs logo and the name of The Society are highly respected in Canada and their use is legally protected in Canada. The organization will respect the name and logo and has Society approval on their use in the Organization's brochures, advertisements, and any other publicly and/or media communications.

- b) The Organization will refer all media inquiries concerning the fundraiser to the designated liaison office for The Society, namely Richelle Leckey.
- c) All communications to the public by the Organization about the fundraiser will be first discussed with and approved by The Society's designated liaison officer, namely Richelle Leckey.

6. The fundraiser will take place from_____.

7. An official income tax charitable receipt will be issued by The Society to those individual donors who donate \$20 or more to The Society. The Organization must take the full name, address, email and phone number of the donor who wishes to receive an official receipt, as well as the date of donation and amount donated. The organization must follow the procedures set out in Schedule B.

8. The Organization and The Society acknowledge and agree that any personal information that is provided for the purpose of tax receipting or otherwise is given to the Organization in confidence and is protected by the CRC Privacy Policy (found on The Society's web site) and applicable privacy legislation, with which the Organization agrees to comply.

9. The Organization is responsible for obtaining any licenses, approvals or permits required to operate the fundraiser.

10. Any fundraiser planned by the Organization that involves gaming must conform to regulations of the governing body for gaming in the province where the fundraiser is to take place. It is the Organization's responsibility to ensure that it is in compliance.

11. The Organization is also responsible for ensuring compliance with its province's liquor regulations.

12. Nothing in this Agreement gives rise to a partnership or joint venture between the Organization and The Society.

AGREED BY: _____

Name of Organization

PER: _____

Office or Representative (Print)

Signature

Date

REQUIRED CONTACT INFORMATION:

Address: _____

Phone Number: _____ Fax: _____

Email: _____

Short Description of Fundraiser: _____

Requirements of the Okanagan Boys and Girls Clubs: _____

PER: _____

Signing Officer

Date

SCHEDULE A – FINANCIAL TERMS

The Organization shall keep an accurate record of all money raised for The Society at the fundraiser, along with all expenses, the categories of which must be approved in advance by the Society, and unless otherwise agreed shall provide the record to The Society within one month of the fundraiser's termination, along with contact information of all donors who have requested or were promised a tax receipt.

SCHEDULE B – GUIDELINES GOVERNING TAX RECEIPTING

The following receipting guidelines shall be in effect:

- a) If the Organization decides to charge an admission fee for the fundraiser, which is equal to the fair market value for the fundraiser, the Society will not provide receipts for the value of said admission fee, as per Income Tax Act, [R.S.C. 1985 c.1 (5th Supp)];

- b) If the Organization decides to charge a fee for a service, food, or commodity being provided (fair market value will be determined by The Society), the Society will not provide receipts for the value of said fee, as per Income Tax Act, [R.S.C. 1985, c. 1 (5th Supp.)];

- c) The Society will only issue tax receipts for the amount of the actual contributions received by The Society. Receipts will not be issued for funds used to cover the costs of the fundraiser or other administrative expenses incurred by the Organization;

- d) The Organization must use temporary receipts when accepting a contribution from a donor. The cost of printing or purchasing the temporary receipts must be borne by the Organization; and

- e) The Organization shall remit the following to The Society within three business days of the termination of the Event, unless otherwise agreed:
 - all money collected from the fundraiser,
 - a list of all the personal information that the Organization has collected, including donor names, donor addresses, the individual donor contributions; and
 - a record of all temporary receipts issued.

Appendix B

FINANCIAL INFORMATION:

Proposed Budget: All costs to come out of the proceeds or to be paid directly by the event organizer.

TOTAL EXPECTED INCOME: (donations, auction, ticket sales, food & beverage sales) A. \$ _____

EXPENSES: (advertising, food, entertainment, rentals) B. \$ _____

ANTICIPATED NET PROCEEDS: (A minus B equals C) C. \$ _____

AMOUNT/PERCENTAGE OF NET PROCEEDS: (to be given to OBGC) D. \$ _____

In an effort to maintain transparency to our donors and supporters, we request that any event advertised as being held in support of the Okanagan Boys and Girls Clubs should not have expenses that exceed 50% of gross proceeds. At a minimum, 50% of net proceeds should benefit the Okanagan Boys and Girls Clubs.

In order to keep administrative costs down, we ask that money submitted be in the form of one cheque and a copy of the Third Party Fundraising Agreement accompanying the cheque outlining the name and date of the event along with any other pertinent information. If there are pledge forms to submit from your event, please attach one cheque for the overall balance along with the detailed pledge forms.

Signed: _____ Date: _____

Organization Rep

Signed: _____ Date: _____

Okanagan Boys and Girls Clubs

Please return the completed form to:

Richelle Leckey, Community Engagement Coordinator
Okanagan Boys and Girls Clubs
specialevents@boysandgirlsclubs.ca
1434 Graham Street, Kelowna, BC, V1Y 3A8
Fax: 250-762-6562

Appendix B
Financial Summary Spreadsheet

Event Name: _____

Revenue	
General Donations	
Cash	
Cheque	
Subtotal:	
Event Revenue	
Ticket/Registration	
Merchandise Sales	
Food and Beverage Sales	
Live/Silent Auction	
Gaming Activities	
Other/Misc.	
Subtotal:	
Expenses:	
Total:	

Number of charitable tax receipts required: _____

(Include list of all donors – Full Name, Address, Postal Code, Telephone Number and Email Address)