



BRITISH COLUMBIA  
SCHIZOPHRENIA SOCIETY  

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**- VICTORIA BRANCH -**

**A Guide to**  
**Third Party Fundraising Events**  
**in Support of**  
**The BC Schizophrenia Society - Victoria**

BCSS Victoria  
941 Kings Road, Victoria, B.C. V8T 1W7  
Phone: (250) 384-4225 Fax: (250) 388-4391  
Email: [admin.bcss@shaw.ca](mailto:admin.bcss@shaw.ca) Website: [www.bcssvictoria.ca](http://www.bcssvictoria.ca)  
Canada Revenue Agency #106778129RR0001

### Third Party Fundraiser Procedures and Guidelines

One of the many ways to support The BC Schizophrenia Society - Victoria (BCSSVIC) is by planning and/or sponsoring an event to raise funds for us. This kind of activity is called a "third-party" fundraiser which is an event organized by an individual or external organization that coordinates and executes the event independent of the BCSSVIC. The net proceeds are donated to BCSS Victoria.

The BCSSVIC is available to lend support, advice, and assistance. We have put together the following procedures, guidelines and tips so all participating parties are clear on their role and responsibilities and to help you organize your fundraiser to maximize your efforts.

If you have additional questions regarding third-party fundraisers, please contact: Hazel Meredith, Executive Director, BCSS Victoria at 250.384.4225 or [execdir.bcss@shaw.ca](mailto:execdir.bcss@shaw.ca).

### Types of Third-Party Fundraisers

- 1. A group or individual can host an event and make BCSS Victoria the beneficiary.** *(Example: An organization hosts a golf tournament or concert and gives BCSS Victoria a cheque for the net profits.)*
- 2. BCSS Victoria can "piggy back" on an existing event, adding a third-party fundraising element, and receive the income produced from that element.** *(Example: A company has an annual party and asks their employees to make a donation to BCSS Victoria or a service club has an annual marathon and they give registrants the opportunity to get pledges for BCSSVIC.)*

### Procedure

1. Submit a description of the event 90 days prior to your event.
2. Include the following information in your description:
  - A full description of the event (BCSS Victoria needs to know what the event involves – a form is included for your convenience)
  - Date, time and location of the event
  - What is expected of BCSS Victoria (volunteers, promotional assistance)
  - Budget, including anticipated costs and projected gross income of the event
  - Plans, if any, for corporate sponsorship
  - Contact information of the director(s) and coordinator(s) of the event

### Third-Party Fundraiser Guidelines

BCSS Victoria has a set of guidelines that we ask all individuals and organizations to follow when fundraising on BCSS Victoria's behalf:

1. The BCSS Victoria name and/or logo cannot be used to promote a third-party event without prior approval by the BCSS Victoria. All approved third-party fundraisers should submit copies of print materials which include the BCSS Victoria logo/name prior to printing.

2. BCSS Victoria asks that you do not organize a third-party fundraiser that includes lotteries, gambling, raffles or drawings without first discussing it with the Executive Director of BCSS Victoria. Any fundraiser that requires any type of license should first be discussed with and approved by BCSS Victoria.
3. Keep accurate accounts of your event. BCSS Victoria will not be responsible for any expenses incurred for a third-party fundraising activity.
4. The third-party fundraising activity should be one that does not conflict with the mission of BCSS Victoria (if unclear, please contact us).
5. Your third-party fundraiser should not conflict with an existing BCSS Victoria fundraising event.
6. All funds and financial accounting must be submitted to BCSS Victoria no later than 30 days after the event.
7. Contact us with any additional questions you may have.

Thank you for thinking of BCSS Victoria as you plan your upcoming event. We greatly appreciate your willingness to support the children, youth and families that we serve.

We ask all individuals and organizations to submit a Third-Party Fundraiser Event Description to our Executive Director for approval prior to including BCSS Victoria as a beneficiary of their event. This will help to clearly establish the parameters and expectations for all parties involved in the activity. It will also ensure to make sure it doesn't conflict with any planned event or solicitations of sponsorships or donations.

To assist you in presenting your third-party event to BCSS Victoria we have created this Third-Party Fundraiser Event Description Form. You may also use the format below to create your own event description form. Your event description should be submitted for approval no later than 90 days prior to your event.

### **About BCSS Victoria**

**BCSS Victoria** was founded in 1984 and our mission is to improve the quality of life for those affected by schizophrenia and psychosis through education, support programs, public policy and research. We connect with over 4000 people per year through community presentations, public forums, peer support and family caregiver counselling and support. We assist people when they are seeking hope to manage their first steps in recovery and seeking empowerment. Families seek our help to better learn about mental illness and how to assist loved ones seeking recovery.

#### **Media Contact:**

Hazel Meredith  
Executive Director  
BCSS Victoria  
250.384.4225  
[execdir.bcss@shaw.ca](mailto:execdir.bcss@shaw.ca)

**BCSS Victoria Third-Party Fundraiser Terms and Conditions**

BCSS Victoria has a set of guidelines that we ask all individuals and organizations to follow when fundraising on behalf of BCSS Victoria :

1. The BCSS Victoria name and/or logo cannot be used to promote a third-party event without prior approval by BCSS Victoria. All approved third-party fundraisers should submit copies of print materials which include the BCSS Victoria logo/name prior to printing.
2. BCSS Victoria asks that you do not organize a third-party fundraiser that includes lotteries, gambling, raffles or drawings without first discussing it with the Executive Director for BCSS Victoria. Any fundraiser that requires any type of license should first be discussed with and approved by BCSS Victoria.
3. Keep accurate accounts of your event. BCSS Victoria will not be responsible for any expenses incurred for a third-party fundraising activity.
4. The third-party fundraising activity should be one that does not conflict with the mission of BCSS Victoria (if unclear, contact BCSS Victoria ).
5. Your third-party fundraiser should not conflict with an existing BCSS Victoria fundraising event.
6. All funds and financial accounting must be submitted to BCSS Victoria no later than 30 days after the event.
7. Contact us with any additional questions you may have.

**I have read and agree to follow BCSS Victoria 's Third-Party Fundraiser Terms and Conditions.**

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**Signature**

**Date**

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**Print Name**

**Print Title**

**Thank you for submitting your completed Third-Party Fundraiser Event Description Form with your signed Third-Party Fundraiser Terms and Conditions. They will be reviewed upon receipt and you will be contacted by BCSS Victoria within five working days.**

**Please forward the completed and signed forms to:**

**Executive Director**

**BCSS Victoria**

**941 Kings Rd, Victoria, BC V8T 1W7**

**or email to [execdir.bcss@shaw.ca](mailto:execdir.bcss@shaw.ca)**

**or fax to 250.388.4391**

**THIRD-PARTY FUNDRAISER EVENT DESCRIPTION FORM** *(Please Type or Print)*

**Name of Proposed Event:**

\_\_\_\_\_

**Date(s):**

\_\_\_\_\_

**Location(s):**

\_\_\_\_\_

**Detailed Event Description:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**EXPECTATIONS OF BCSS VICTORIA** Please describe in detail the support expected from BCSS Victoria . (eg. Number of volunteers as well as times, duties, etc.; Promotions — press releases, invitations, etc.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**ANTICIPATED COST & GROSS INCOME OF EVENT**

**Anticipated Gross Income: \$**

\_\_\_\_\_

**Source(s) of Income:** *(i.e. ticket sales, sponsorships, auction, etc.)*

\_\_\_\_\_

**Anticipated Corporate Sponsors**

\_\_\_\_\_

**Anticipated Expenses:**

\_\_\_\_\_

**Types of Expenses:** *(i.e. printing, food, location, etc.)*

\_\_\_\_\_

**EVENT ORGANIZER CONTACT INFORMATION:**

**Name:**

**Title:**

\_\_\_\_\_

**Company:**

\_\_\_\_\_

**Address:**

\_\_\_\_\_

**City:**

**Prov:**

**Postal Code:**

\_\_\_\_\_

**Work:**

**Fax:**

**Cell:**

\_\_\_\_\_

**Home Phone:**

**Email:**

\_\_\_\_\_

### Tax Receipting Guidelines

#### Donations/pledges to the BCSS Victoria

- All donations or pledge payments to BCSSVIC of \$10 or greater are eligible for a tax receipt
- We require name, mailing address and phone number of donor
- Tax receipts are issued by BCSSVIC upon receipt of donation(s)

#### Gifts (Donation of prizes)

- Gifts-in-kind are eligible for tax receipts, only if no print recognition is given in exchange for the donation of the gift.
- We require name, address and phone number of donor
- Tax receipts are receipted at fair market value and gifts under \$1,000 should be accompanied by a store or business receipt or business invoice stating value of gift and description of item being donated; gifts of \$1,000, including artwork, or over must be accompanied by a formal appraisal by an appropriate source.
- Gifts-in-kind valued \$4,999 or greater need to be approved by BCSSVIC and formal appraisal will be required
- Tax receipts are issued by BCSSVIC upon receipt of invoice & item description and appraisal if applicable

#### Gifts of Service (i.e. labour costs)

- Labour, wages, or services **are not** eligible for tax receipting

#### Sponsorships (receiving printed acknowledgement of donation)

- When the benefits and recognition offered by BCSSVIC to a donor are considered to be material based on the guidelines of the CRA the sponsorship is not eligible for a tax receipt
- Printed acknowledgement includes the sponsoring organization having their business logo located on print material
- We need confirmation that donors have agreed to be publicly recognized in an event publication as a donor including in donation ads

#### Purchasing of prizes (donating proceeds to BCSSVIC)

- Are eligible for a tax receipt via a cheque exchange; a donation of services is not eligible for a tax receipt
- Prize is receipted at full value with the receipt of item description and invoice

#### Procedure for cheque exchange

- Third Party Event purchases item
- Send an invoice to BCSSVIC with copy of receipt from purchase
- BCSSVIC will issue a cheque for the invoiced amount
- Third Party event organizer issues a cheque for the same amount back to BCSSVIC
- BCSSVIC issues a tax receipt for the donated amount.

## **Ten Steps to a Successful Fundraising Event**

Here is an easy to follow checklist to assist you in organizing your event:

### **1. Decide on type of event**

Chat with friends and colleagues to develop an idea for an event that excites you. Don't have any ideas? Here are a few to get you started....

Galas	Head Shaves	Children's Events
Sporting Events	Auctions: Live & Silent	Celebrity Appearances
Theatrical Events	Curling Bonspiel	Carnivals
Dinners and Dances	Tournaments	Holiday Celebrations
Fashion Shows	Barbeques	

### **2. Form an event committee**

It takes a lot of time and energy to plan a successful event. Recruit enthusiastic and dedicated volunteers to help make your event a success. Committee areas could include:

Securing the venue	Volunteers	Marketing and publicity
Obtaining applicable licenses	Acquiring auction items	Ticket Sales
Organizing food & beverage	Soliciting sponsorships	

### **3. Get your event in our calendar**

BCSS Victoria wants to know more about your event. Once you have decided on an event concept, please complete a Third Party Fundraising Event Application and submit it to BCSS Victoria 941 Kings Rd, Victoria, BC V8T 1W7 or email it to [execdir.bcsst@shaw.ca](mailto:execdir.bcsst@shaw.ca). This way we are able to support your event and possibly help make your event an even greater success.

### **4. Set a goal**

Set a fundraising goal for your event. The most successful events start by setting a goal, and working towards it. Establish a budget that shows all your expenses and how much you expect to bring in to reach your goal amount. If you are selling tickets, your ticket price should cover all expenses plus the donation amount if you are collecting donations through ticket sales.

### **5. Determine your target audience**

Understanding who will support and attend your event is crucial to its success. Identify your target audience for promotion and participation. This can include age groups, community groups, and types of people i.e. golfers, business people etc... Make sure you have access to your desired audience in the numbers you need to make your event a success. Remember about 1 in 10 of your audience may attend depending on who you are asking and your relationship with them.

### **6. Set the date and location**

Schedule your event for a day, time and a location convenient for those who will be attending. Don't forget to take a look at events that are also going on in your community and what groups they are targeting, try not to conflict with any similar events. Book your venue in advance.

### **6. Event logistics**

Attention to detail is essential to the success of every event. BCSS Victoria can review the logistics of your event to help ensure you are on the right track. Indicate on the application form what materials you will need such as donation forms, and we might be able to help.

### 7. Promotion

Flyers, posters and other promotional materials will help make your event a success. Ensure your promotional materials clearly state the date, time and location of your event. It is also a good idea to indicate what the ticket price includes (i.e. drinks, hors d'oeuvres, and door prizes) and where the event proceeds go. We ask that all materials be sent to BCSS Victoria so that we can have them on file in case we get inquiries about your fundraising initiative. As a policy, BCSS Victoria does not pay for advertising, therefore, it is a good idea to arrange sponsorship from local papers or use Greater Victoria's community bulletins and notices. Please remember that unauthorized use of the BCSS logo is prohibited. Submit a proof of any promotional materials prior to printing/distribution.

### 9. Collection of funds

Once all donations have been received and all expenses paid, compile a list of revenue and expenses and prepare a cheque for the proceeds raised, made out to the BCSS Victoria and send your cheque to 941 Kings Road, Victoria, BC V8T 1W7.

If you require charitable income tax receipts, we ask that you collect and submit the net funds raised to the BCSS Victoria within 30 days of your event. To meet the Canada Revenue Agency guidelines, donor's names, addresses and donation amount must be provided before receipts can be issued. For additional information regarding tax receipts, visit the Canada Revenue Agency web site: [www.cra-arc.gc.ca/tax/charities](http://www.cra-arc.gc.ca/tax/charities).

### 10. Thank yous

Donors cannot be thanked enough. Thank individuals, sponsors, attendees and anyone providing services or gifts to your event. Let those who participated know how much you appreciate their support. Tell them how much money was raised and what that means to BCSS Victoria for the people they serve. The BCSS Victoria will send a special thank you letter and charitable receipt if appropriate, however, donors will always appreciate a personal thank you from the event organizer.