



## Third Party Fundraising Package

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## Third Party Fundraising Package

### GUIDELINES

Thank you for considering OCPSA (Charitable Registration #10779 7136 RR0001) as a beneficiary of your fundraising activities! All money raised will support programs that enhance the quality of life of children and adults with cerebral palsy and similar disabilities by enabling their participation in sport and active recreation.

Please read the guidelines below carefully prior to submitting the application. Should you have further questions about holding an event, please contact Kira Crozier at [kira@ocpsa.com](mailto:kira@ocpsa.com).

*Please note – OCPSA's Third Party Application must be completed and all fundraisers must be approved prior to being organized or held.*

#### **We Can Provide:**

- Tax receipts if in accordance with Canada Revenue Agency and OCPSA guidelines
- A letter of support acknowledging the event
- Informational materials

#### **We Can't Provide:**

- Guarantee of staff or volunteer presence
- Prizes, rewards or merchandise
- Event logistical support such as ticket sales, locating venues, set-up/take-down and so forth
- Funding or reimbursement of expenses related to the fundraising event

#### **Included in this package:**

- OCPSA Third Party Fundraising Guidelines
- OCPSA Third Party Fundraising Application
- OCPSA Third Party Fundraising Agreement
- OCPSA Third Party Fundraising Event Survey/Summary Form  
This form should be completed and returned to OCPSA within 30 days following the completion of your event.
- OCPSA Third Party Fundraising Event Donation Tracking Sheet  
This form must be submitted in order for event donors to receive charitable tax receipts from OCPSA. Please ensure you read the enclosed "Tax Receipting Guidelines" before submitting this form as not all gifts may qualify for a tax receipt.



## Third Party Fundraising Package

### GUIDELINES continued

#### What is a Third Party Fundraising Activity or Event?

Third party activities and events are fundraisers that in whole or in part benefit OCPSA, its mission and its goals, and which are organized and executed by an individual or organization external to the charity.

#### Approval Process

- Organizers must complete and submit the Third Party Fundraising Application to OCPSA preferably no less than 3 weeks prior to the date of the proposed fundraising activity. Approval must be received before advertising is permitted.
- Applications are valid for one (1) event only. Annual event and activity organizers will need to reapply each year (per event).
- OCPSA must be notified of other activity/event beneficiaries as well as activity/event sponsors.
- OCPSA reserves the right to deny any application for a fundraising activity that is not in line with OCPSA's mission and/or goals, or which does not project a positive image of OCPSA.

#### Event Promotion and Use of the OCPSA Name and Logo

- Your organization/group must receive permission from OCPSA to use our name and/or logo in conjunction with your event. OCPSA requests that all promotional materials are submitted to the foundation for approval prior to distribution. High resolution files of the OCPSA logo are provided upon request.
- Please note: The OCPSA logo cannot be used for any purposes other than those described in the Third Party Fundraising Application.
- All promotional materials should clearly state that the activity or event is "In Support of" or "Proceeds to" followed by the OCPSA logo. Materials must NOT state that OCPSA is a sponsor or co-sponsor of an activity or event unless otherwise approved by OCPSA in writing.

#### Liability

- If you are conducting raffles, lottery sales or any other type of activity that involves selling to the general public, you may require a special license or permit. Please make sure you take the necessary steps to obtain these. OCPSA will not provide licenses or permits for third party activities or events and will not be held liable should your event or activity be found in violation of these rules and guidelines.
- OCPSA will not provide any insurance coverage for third party events or activities. Event organizers must take the necessary steps to obtain proper insurance.
- OCPSA, its employees, volunteers and members are not liable for any accidents or injuries, damage or theft to individuals or property and cannot assume any type of liability for your event/activity, participants, volunteers or employees.



## Third Party Fundraising Package

### GUIDELINES continued

#### Charitable Tax Receipts

OCPSA will issue donation receipts for any qualifying monetary donation. If an individual has made a donation, the receipt will be issued in the name of that individual at their home address. If a corporation has made a donation and a receipt is requested, the receipt will be issued in the company's name at the corporate address. An individual or corporation cannot receive a charitable donation receipt for monetary donations made by other parties. For example, an individual or organization cannot receive a receipt for the total proceeds of an event or activity (as monies were donated by multiple parties).

If you require donation receipts issued to participants of your event or activity, we ask that you include OCPSA's Charitable Registration number (10779 7136 RR0001) on all promotional materials. We ask that you state "tax receipts will be issued for donations of \$20 or more, or on request."

Within 30 days following your event or activity, please provide OCPSA with a list (making sure that all information is legible and complete) of names, mailing addresses including postal code, phone numbers and email address, as well as the corresponding amount of each gift to be received. Donation receipts will be issued for all monetary donations of \$20 or more.

OCPSA will issue charitable donation receipts for in-kind donations (donations of property such as prizes or merchandise) equal to the Fair Market Value of the item(s) donated provided supporting documentation verifying Fair Market Value is received. Qualifying documentation of Fair Market Value includes: purchase invoice(s) or other proof of purchase, third party appraisal and other CRA-approved documentation. As per CRA regulations, items of little market value such as handmade crafts will not qualify for donation receipts. In kind donations of services are also not eligible for donation receipts for income tax purposes.

Goods and services not eligible for a donation receipt include items such as raffle or lottery tickets, general admission or entrance tickets, golf green fees, and the cost of donated services. This includes special services that necessitate hiring someone for an event (i.e. tent set-up and entertainment).

A tax receipt may be issued for a portion of the admission price when tickets or entrance fees exceed the cost per person required to put on the event. However, receipts can only be issued for the portion of the admission price exceeding Fair Market Value and cannot be issued for more than 80% of the admission price.

Corporations and businesses that sponsor an event will receive an official invoice or thank you letter from OCPSA that would enable them to claim back the full amount of their sponsorship as a marketing expense (when applicable).



# Third Party Fundraising Package

## THIRD PARTY FUNDRAISING APPLICATION

### I. Organization Information

Name of Organization (if applicable): \_\_\_\_\_

Website: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Province: \_\_\_ Postal Code: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

Ph # (w): \_\_\_\_\_ Ph # (h): \_\_\_\_\_ Ph # (c): \_\_\_\_\_ Fax #: \_\_\_\_\_

### II. Event Information

Name of Event: \_\_\_\_\_

Event Type: \_\_\_\_\_ Expected Number of Attendees: \_\_\_\_\_

Event Address: \_\_\_\_\_

Start Date and Time: \_\_\_\_\_ End Date and Time: \_\_\_\_\_

How will you promote the event? \_\_\_\_\_

Event Description/Summary: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Fundraising Goal (after expenses): \_\_\_\_\_

Please attach a copy of any licenses, permits and proof of liability insurance.

If you are selling goods & services please indicate what will be sold and if a portion of the proceeds will be donated to OCPSA.

### III. Financial Information

How will funds be raised (please check all that apply):

Pledges \_\_\_ Auction \_\_\_ Ticket Sales \_\_\_ Gaming \_\_\_ Donations \_\_\_ Sales \_\_\_ (liquor, merchandise, etc.)

Other (please explain): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



## Third Party Fundraising Package

### THIRD PARTY FUNDRAISING APPLICATION continued

Are you approaching sponsors? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please list organizations being approached to avoid potential conflicts with current or potential OCPSA sponsors.

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Will the proceeds of your event/activity be donated only to OCPSA? Yes \_\_\_ No \_\_\_ If NO, please list who else will be benefiting from the event and what percentage OCPSA will receive?

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Will you require tax receipts? Yes \_\_\_ No \_\_\_ If yes, please review the receipting guidelines on page 3.

#### IV. OCPSA Involvement

Please note: We will do our best to support you, but ask for your understanding that our resources are limited and we typically cannot meet requests for speakers, representatives and volunteers.

Will you require the OCPSA name and logo for promotional use? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes please indicate what type of materials you will be producing:

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If you would like promotional materials from OCPSA, please indicate quantities required:

Brochures: \_\_\_\_\_ Other: \_\_\_\_\_

Would you like the event to be shared on OCPSA's social media? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please provide your social media information and attach an example of a post.

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Is there any other important information OCPSA should know regarding your event?

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## Third Party Fundraising Package

### THIRD PARTY FUNDRAISING AGREEMENT

Please review and sign a copy of this form, and return it with the Third Party Fundraising Application.

This form is due three (3) weeks prior to the proposed event. Completion of this form does not guarantee approval. Upon approval, you will receive an approved signed copy of the application for your records.

By signing this document, I/we acknowledge receipt of OCPSA's Policies and Procedures for Third Party Fundraisers and agree to comply with all provisions in organizing and holding our fundraising event.

I/we also agree with the collection of any and all information OCPSA deems necessary to evaluate the event. I/we further attest that all information provided on this form is correct and accurately describes the proposed event. I/we agree to indemnify and save harmless OCPSA for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any terms or provisions of OCPSA Policies and Procedures for Third Party Fundraisers.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

On behalf of OCPSA, thank you for supporting us and helping us to enhance the quality of life of children and adults with cerebral palsy and similar disabilities by supporting their participation in sport and active recreation.

Please return this form to: Kira Crozier at [kira@ocpsa.com](mailto:kira@ocpsa.com).



## Third Party Fundraising Package

### THIRD PARTY FUNDRAISING EVENT SURVEY/SUMMARY

1. How successful did you feel your event was?  
(lowest) 1 2 3 4 5 (highest)

2. Did you meet your financial goals?                      Yes      No

3. Are you planning on hosting this event again?                      Yes      No

4. If so, how often?      One-time      Annually      To be determined

5. How satisfied were you with the amount of support you received from OCPSA for your event?  
(lowest) 1 2 3 4 5 (highest)

6. Do you have suggestions to help OCPSA make the process of hosting a third party event better?

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7. Please provide us with a brief financial summary of your event:

Total \$ amount raised from the event: \$ \_\_\_\_\_

Total expenses: \$ \_\_\_\_\_

Total donation to OCPSA: \$ \_\_\_\_\_



