



Third Party Application Form & Guidelines

Thank you for your interest in supporting Kerry's Place Autism Services! In order to best serve you, please complete the following application and return the signed document.

EVENT ORGANIZER/MAIN CONTACT

Name: _____ Title: _____

Business/School/Church/Community Group (if applicable): _____

Address: _____

Postal Code: _____ Cell Phone: _____ Email: _____

EVENT INFORMATION

Date: _____ Time: _____ Location: _____

Event Description:

How many people do you expect to attend:

How much money (approx.) do you hope to raise:

10 50 100 Other: _____

\$500 \$1,000 \$5,000 Other: _____

PROMOTIONAL MATERIALS REQUESTED

| Item | Required | Quantity | Date Required By |
|--------------------------|----------|----------|------------------|
| Logo | Yes / No | | |
| Banner** | Yes / No | | |
| 8.5x11 Awareness Posters | Yes / No | | |
| Brochures | Yes / No | | |
| Donation Cards | Yes / No | | |
| Other | | | |

Do you wish to have a representative from Kerry's Place attend your event? Yes / No

***Please note that if you request a banner, it must be returned to Kerry's Place Head Office the next business day*

PLEASE RETURN COMPLETED FORM TO:

Fundraising Manager
34 Berczy Street, Suite 190
Aurora, ON L4G 1W9
905.841.6611 ext. 371
fundraising@kerrysplace.org



GUIDELINES – THIRD PARTY EVENTS

Thank you for including Kerry's Place Autism Services in your event planning! We appreciate your support in enhancing the quality of life for people with Autism Spectrum Disorder.

For approved community events/promotions, the Third Party Event Organizer(s) ("Event Organizer(s)") and Kerry's Place Autism Services are required to adhere to the following guidelines:

Approval Process

Kerry's Place Autism Services (*herein referred to as KERRY'S PLACE) and Event Organizer(s) will reflect the requirements and principles in these Guidelines. All fundraising events benefitting Kerry's Place should have prior approval.

Canada Revenue Agency mandates specific tax receipting protocols. Click this link or paste this into your browser for more information: <http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/whtknw-eng.html>

Liability and Accountability

The Event Organizer(s) will:

- Requests for tax receipts must be accompanied by an accurate record of revenues and expenses for KERRY'S PLACE.
- Provide periodic status updates to KERRY'S PLACE on an agreed-upon frequency.
- KERRY'S PLACE will not be responsible for any financial losses or unsettled accounts of the Event Organizer(s) or fundraising event.
- KERRY'S PLACE will be advised if the event is to benefit other charitable organizations, who these are, and what percentage of the final net revenue they will receive.
- KERRY'S PLACE will be provided with reasonable prior notice of any third party event cancellation.
- No oral or written commitments will be entered into by the Event Organizer(s) on behalf of or in the name of KERRY'S PLACE.

Financing

Financing, in accordance with KERRY'S PLACE's legal obligations to comply with Canada Revenue Agency guidelines, KERRY'S PLACE will not underwrite any third party event.

Insurance

KERRY'S PLACE will not provide insurance coverage for any third party events. KERRY'S PLACE will not assume any legal or financial responsibility relating to the fundraising event or Event Organizer. KERRY'S PLACE is not responsible for any damage, theft or accidents to individuals or property. It is the duty of the Event Organizer(s) to ensure adequate liability coverage for their event.

Licenses and Fees

Third party events involving licenses and fees will comply with all government regulations and applicable laws. The Event Organizer(s) will pay for all applicable licensing and/or permit fees and costs.



Event Promotion and Solicitation

KERRY'S PLACE will have final, signed approval on ALL promotional materials including brochures, flyers, advertisements, publicity and/or media communications relating to its participation in the fundraising event.

The Event Organizer(s) is responsible for making all media contacts and must ensure that it is clear that KERRY'S PLACE is not the organization requesting media coverage and/or participation. KERRY'S PLACE will, at its discretion and depending on supplies and reasonable requirements, provide existing in-house promotional materials. KERRY'S PLACE will not provide any donor contact lists. All sponsorship solicitation lists must be reviewed and approved by KERRY'S PLACE.

Use of KERRY'S PLACE Name and Logo

KERRY'S PLACE will, in its discretion and upon prior written approval, allow the use of its "Proud Supporter of Kerry's Place" logo by the Event Organizer(s) to promote the event. Any use of the logo must be approved, in writing, prior to its use. KERRY'S PLACE reserves the right to withdraw the use of its name at any time and will not assume any costs or liabilities that may be incurred in doing so.

Sponsorship

KERRY'S PLACE will not solicit sponsors on behalf of the Event Organizer(s), nor will it provide contacts for sponsorship. Any third party contacting potential sponsors must disclose the nature of the third party arrangement and must position KERRY'S PLACE as a recipient of the event proceeds, not the host or sponsor of the event. If sponsorships are in opposition to our mission or if sponsors conduct their business in manners that violate our goals, Kerry's Place reserves the right to void this agreement.

Staffing

The Event Organizer(s) will not provide the workforce for the event unless otherwise agreed upon with KERRY'S PLACE. KERRY'S PLACE will not guarantee representatives to attend or participate in the event.

Privacy

KERRY'S PLACE is committed to adhering to the requirements of the Federal Privacy legislation (PIPEDA) and requires that these requirements be adhered to by the Event Organizer(s) and associated employees, contractors, agents and volunteers. All information obtained and used by KERRY'S PLACE will be treated with the utmost confidentiality and security in accordance with KERRY'S PLACE policies.

Tax Receipts

- KERRY'S PLACE will issue tax receipts only in accordance with CRA regulations.
- **Revenues from raffle tickets, cost of admission, golf greens fees, auction items and other goods that provide a benefit to donors are NOT eligible for a tax receipt from KERRY'S PLACE**, except when an admission fee exceeds the Fair Market Value (FMV) of the benefits received.
- Receipts are issued only for direct donations where the donor receives no benefit for the contribution.
- Event Organizer(s) must provide a complete and legible list of donors to KERRY'S PLACE which includes:
 - First and last name with address, including city and postal code
 - Amount given and amount tax receipt to be issued for
 - List and value of any benefits received for donation
 - Any other information reasonably required by KERRY'S PLACE
- KERRY'S PLACE will issue tax receipts to individual donors and business acknowledgement letters to organizations that donate to or sponsor the event.



- Tax receipts will only be issued by KERRY'S PLACE for cash donations of \$20.00 or greater.
- A tax receipt by KERRY'S PLACE **CANNOT** be issued for donated services.
- A gift of property other than cash is referred to as a "gift-in-kind." KERRY'S PLACE will issue a business acknowledgement letter to businesses provided that the Event Organizer(s) supplies adequate documentation to verify the Fair Market Value of the item(s) donated, at the discretion of KERRY'S PLACE. Fair Market Value will be established by providing KERRY'S PLACE with:
 - A purchase invoice or other proof of purchase of the item.
 - An independent third party appraisal and value of the item. All costs of appraisal shall be borne by the Event Organizer(s) and Kerry's Place will not reimburse the costs of the appraisal.
 - A current price list for the item at a recognized commercial enterprise operating independently of the donor.
- The total amount of receiptable donations KERRY'S PLACE is able to receipt for an event cannot exceed the total Net Revenue that KERRY'S PLACE receives from the event.

Post-Event Financial Summary

Within 15 days after the Event, a list of revenues and expenses must be submitted to KERRY'S PLACE.

I have read, understand and agree to be bound by the Guidelines as identified above.

Name of Event Organizer: _____

Authorized Signature of Event Organizer* _____

**If Event Organizer is a Corporation, the person signing this document MUST have the authority to bind the corporation.*

Date: _____

Name of KERRY'S PLACE Staff Member: _____

Authorized Signature of KERRY'S PLACE Staff Member: _____

Date: _____

